

PRECISION TARGETING FOR ULTRA-HIGH-NET-WORTH CPA OUTREACH

INDUSTRY: ACCOUNTING/FINANCIAL SERVICES (CPAS WITH EARNINGS >\$200K)

Client Overview:

A New York City-based accounting firm generates \$50 million in revenue and employs 80–150 professionals, serving ultra-high-net-worth clients.

Objective:

To acquire advanced tax automation software insights and targeted lists of equity partners at boutique CPA firms for high-value outreach.

Challenges:

- Difficulty customizing solutions for complex client portfolios.
- Limited visibility into equity partners at boutique firms for precise targeting.

Solution:


- Provided verified lists of high-net-worth CPAs segmented by firm type and portfolio specialization.
- Delivered targeted insights to optimize outreach to equity partners.


Results:


- Improved engagement with ultra-high-net-worth CPA partners.
- Enabled precise, ROI-driven marketing campaigns tailored to complex portfolios.

Client Feedback:

"Infodepots' targeted data helped us reach the right CPA partners efficiently, enhancing our campaign performance."

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