ADVIZORPRO

RIA & Private Wealth Team Database

The Industry's Most Accurate Lead Database

AdvizorPro gives sales and marketing teams a clear edge - uncovering high-impact intelligence on RIA and private wealth teams, and decision-makers to accelerate prospecting and growth.



Unlock Accurate, Fresh Contact Data

Drive deeper penetration in your current markets and confidently expand into new ones - with continuously updated RIA and private wealth firm intelligence.

- Direct, continuously verified contact data
- Unique advisor and team-level structures
- Validated email and CRM-ready exports
- Unlocked profiles with deep contextual insight

Unlock Wealth Advisor Teams

Access detailed intelligence on over 25,000+ wirehouse, aggregator, and independent broker-dealer teams - including firms like Hightower, William Blair, Mariner, and Morgan Stanley.

- View team hierarchies and structures across major wirehouses, regional firms, and independents.
- Identify investment focus, growth trajectory, and affiliated institutions to align your outreach with their strategy.
- Target advisors based on product relevance, distribution channel, or client segment to maximize engagement.

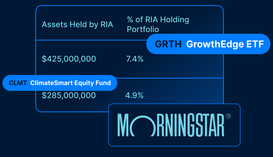


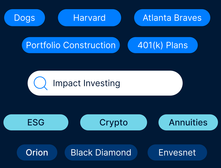
Private Wealth Teams Data

Commonwealth · HIGHTOWER · Morgan Stanley · MARINER · UBS

Target RIAs With ETF Holdings Intelligence

- Analyze advisor 13F ETF & stock holdings
- Identify hot leads by complementary and competitive ETF holdings
- Search by ticker, Morningstar category, and fund family to analyze RIA portfolios

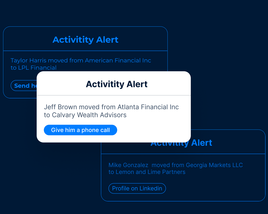




Discover Leads with the Highest Intent

Prioritize your outreach with intent-based targeting that surfaces firms and teams actively engaged in your product category or investment theme.

- Discover RIAs and wealth teams by ETF or SMA exposure
- Filter by tech stack, custodian, and investment interests
- Set automated alerts when new advisors match your ideal criteria



Stay Ahead With Lead Alerts

Never miss a move. Be notified instantly when new opportunities align with your criteria.

- Real-time email alerts on advisor and firm updates
- Dynamic triggers for team changes, new allocations, or growth signals

Coverage

Number of contacts & firms

288,000+ RIA Reps Firms: 12,000+	129,000+ B-D Reps Firms: 2,800+	
64,000+ Wirehouse Reps Firms: 4	10,000+ Family Office Contacts Firms: 2.850+	8,700+ Bank & Trust Contacts Firms: 1,500+
1.4 Million+ Insurance Producers	15,000+ Private Fund Advisors	22,000+ Private Wealth Team

Seamless CRM Integration

Push clean, structured data directly into your workflow. AdvizorPro integrations are purpose-built for asset managers and wealthtechs.

- Connect with Salesforce, HubSpot, Dynamics, and more
- Sync contacts, leads, and accounts automatically
- Eliminate manual updates and accelerate follow-up

