

# AdvisorTarget Intent Signals

PREDICTIVE AND ACTIONABLE FINANCIAL ADVISOR INTENT DATA

- ✓ Execute powerful go-to-market strategies directed toward advisors who are expressing an interest in your product or firm
- ✓ Surface advisors' most timely interests using advanced data science to signal opportunities to effectively engage
- ✓ Customize intelligence for your business needs by choosing defined categories and product types
- ✓ Plan strategically using historical and ongoing trend monitoring on specific interests and signals
- ✓ Enrich profiles dynamically to power enhanced persona development and superior segmentations

## HOW IT WORKS

### CAPTURE

Organic Reading Choices of Advisors

### APPEND

Insights to Advisor Profiles

### SURFACE

Timely, Active Interests

### SIGNAL

Opportunities for Sales and Marketing

Empower your teams with financial advisor intent signals.



## Recruiting

Identify advisors actively planning a move.



## Distribution

Surface advisors in the market for specific products now.



## Marketing

Amplify your demand generation efforts.

## It all starts with the data.

### SELECT

Identify your market: Financial Services or both Financial Services and Insurance.

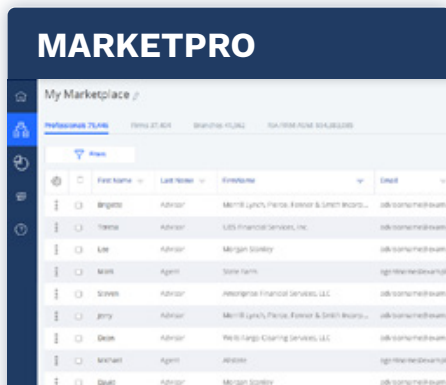
### ENHANCE

Enrich financial advisor profiles with predictive AdvisorTarget Intent Signal data.

### ACCESS OR DELIVERY

Identify your access or delivery method.

#### MARKETPRO



We match Intent Signals data by CRD/NPN and provide those professionals as a criteria bundle in our market intelligence tool.

#### MARKETLINK FEEDS

	A	B	C	D
1	Rep CRD	First Name	Last Name	Firm Na
2	1234567	Brigette	Advisor	Merrill
3	2345678	Teresa	Advisor	UBS Fir
4	3456789	Lee	Advisor	Morgan
5	4567891	Mark	Agent	State F
6	5678912	Steven	Advisor	Amerip
7	6789123	Jerry	Advisor	Merrill

We provide Intent Signals data as a file for CRM or data warehouse integration available one-time, quarterly, or semi-annual.



We are your strategic partner for marketing impact, creating integrated marketing programs including email, call center, and ad targeting services.



Seamlessly integrate Discovery Data MarketLink Feeds into your organization's existing workflow through Snowflake Data Marketplace.

