High Net Worth Insight

Uncovering Wealth for Your Prospecting Needs

High Net Worth Insight is the leading provider of data, insight, and intelligence on high net worth individuals, foundations & endowments, and retirement plans. Our solutions & services help you research new prospects and leverage your existing client base to generate referral opportunities.

☐ Our Data

High Net Worth Insight contains data on over 2.5 million high net worth individuals, 125,000 foundations and endowments, and 1.1 million retirement plans. With new information available on a daily basis, you can continuously track the activities of wealthy individuals and the businesses and foundations they are involved with. Our daily tracking includes:

- New job appointments
- Investor manager hires
- Insider transactions
- M&A activity

YOUR CUSTOM EMAIL ALERTS

Your custom email alerts have returned the following results (log in to edit):

1. New Exec Alert Test (16 items)
2. New Insider Transactions (2623 items)
3. New Job Appointments (188 items)
4. New Mergers/Acquisitions in my Area (78 items)

VIEW/EDIT YOUR TRACKED COMPANIES AND EXECUTIVES

View My Tracked Executives

☐ High Net Worth Individuals

We provide the most comprehensive and accurate data available on over 2.5 million high net worth individuals and the 1.1 million retirement plans they are associated with. This highly-integrated data set provides you with a full wealth profile for each individual. Below are the some of the key elements that we track:

- Money in Motion! Events
- Wealth Scoring
- Social Networking
- Daily E-mail Alerts

Our data on high net worth individuals, foundations, and retirement plans can be accessed through a corporate access license or by linking with your existing CRM and/or other internal systems.

☐ Wealth Creating Events

Wealth Creating Events can transform the financial picture of your clients and targets overnight. As a result, High Net Worth Insight tracks these events every single day to ensure that you are the first to know about any changes that are taking place for your clients or within your geographical scope. Each day, High Net Worth Insight tracks: new executive appointments and promotions, insider transactions, merger & acquisitions, IPO's, venture financings, and new manager hires. This information allows you to identify exactly the right time to be focusing on a particular client or prospect. With our daily email alerts, you can have this delivered to your inbox each morning to keep you abreast of market changes.

This Week's Wealth Creating Events for: All

Mergers & Acquisitions	IPOs/Venture Financing	Insider Stock Transactions (Over $100k)

☐ Track Your Existing Clients

With the High Net Worth Insight Wealth Tracker Service, you can automatically monitor the changes within your existing client base. We work with you to match your client list to our database of high net worth individuals. Once the match is complete we structure the customized email alerts to automatically be sent each day. You can have all of the wealth creating events go to a central marketing group or directly to the advisor or private banker with the end customer relationship. Either way, this intelligence can help you stay on top of your relationships and quickly identify opportunities to grow your assets under management.

☐ Foundations & Endowments

High Net Worth Insight also provides detailed intelligence on over 125,000 foundations and endowments. This untapped market can create a tremendous opportunity for sophisticated broker dealers and RIAs. Our detailed profiles includes powerful information on assets, investment managers utilized as well as the key officers and trustees you need to most effectively reach this audience.

- Detailed Foundation & Endowment profiles
- Access to Trustee and Officer details
- Find investment preferences
- Powerful search capabilities
- Leverage your existing client base to reach Foundations & Endowments

With the matched information we are able to tell you which foundations your current clients can connect you to. This incredibly powerful solution allows you to quickly tap into a tremendous new source of assets by using targeted referral based marketing.

☐ 401K & Pension Data

High Net Worth Insight provides the most comprehensive and up-to-date data available on 401K & Pension Plans. Track the largest pensions in the country as well as the small, profitable profit sharing plans that can lead you to high net worth individuals.

By matching your existing 401k clientele to the High Net Worth Insight database, we can help you determine the executives that your firm should be focused on for additional wealth management services. In addition, once this link has been made you can track the daily activities of these firms including new executives hired, insider transactions, and M&A Activity.

☐ About Us

Infinata is part of the Financial Times Group, publisher of the Financial Times newspaper and FT.com. FT Group is a division of Pearson plc, the international media group.

☐ Contact

High Net Worth Insight
100 River Ridge Drive, Suite 204
Norwood, MA 02062
Tel: (781) 702-6938
Email: hnwsales@infinata.com