

2026 Edition



# The Organic Growth Playbook for Financial Advisors

How to implement relationship mapping and intent  
signals into your workflows

# SECTION 1

## Introduction

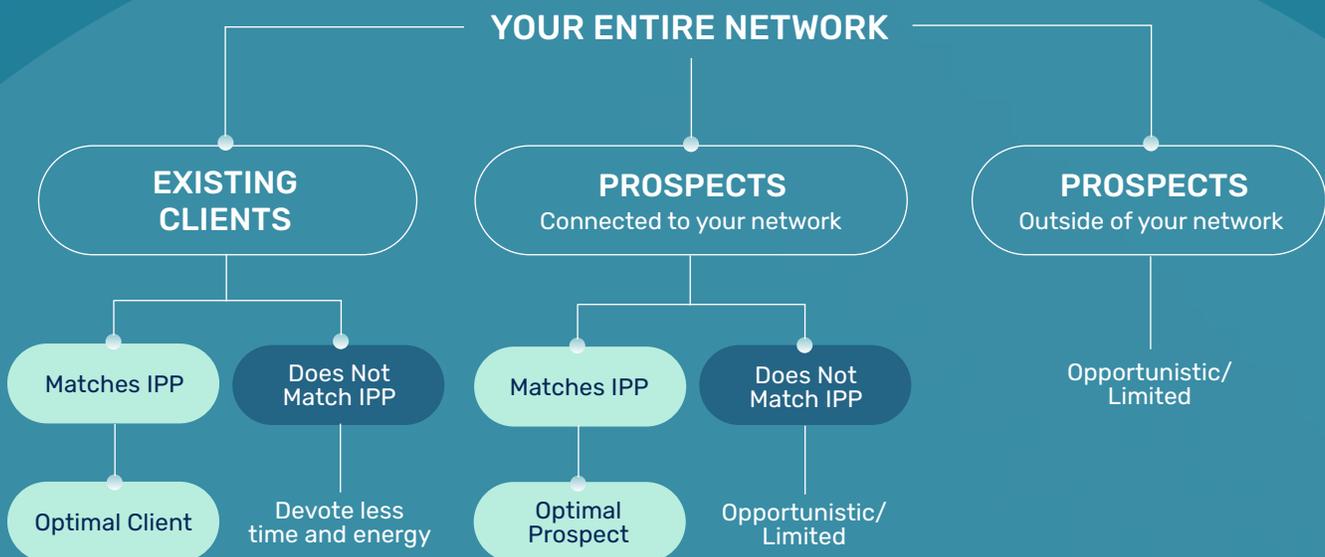
How work gets done is changing. AI is transforming every industry, including wealth management. But building real trust with your clients depends on understanding their lived experience, something that can never truly be automated. Real human connection is still the ultimate competitive advantage.

***The question is how you build those connections at scale.***

Traditional cold outreach methods don't accomplish organic growth at scale. The advisors and firms dominating the industry today have replaced guesswork with data insights and manual tasks with streamlined processes and automated systems.

This playbook introduces you to **Wealth Network Intelligence™**. Our approach combines comprehensive people and income data with relationship mapping to help you discover opportunities already present within your personal and professional circles.

By integrating these insights into your daily rhythm, you can unlock the power of your network, act on "money-in-motion" signals, and scale your practice with precision.



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## Aidentified and Wealth Network Intelligence(™)

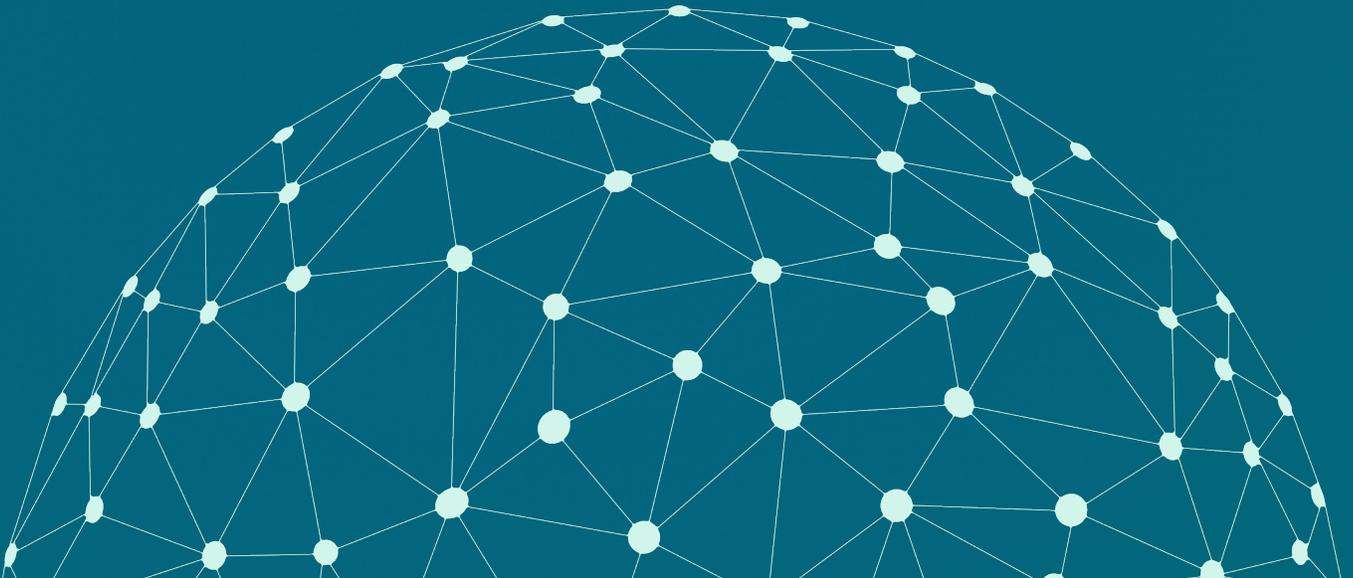
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## Next Steps: Organic Growth at Scale

SECTION 2

# The Organic Growth Challenge



## Organic Growth isn't easy.

Below are the common prospecting challenges financial advisors face.

### 01. Limited Visibility

Affluent prospects don't always advertise their wealth. These prospects are often buried in lists or scattered across disparate sources in your organization. Advisors lack a 360° view of potential clients, making it hard to target the right people.

### 02. Outreach Strategy that Don't Scale

Without personal connections, advisors have to rely on low performing tactics like cold calls and emails, which typically see success rates in the single digits. Warm introductions convert at far higher rates. The missing link is a system to create warm introductions on demand.

### 03. Disconnected Networks

Even well-connected advisors are often unaware of all the relationships that could lead to referrals. Your next big client might be a friend-of-a-friend or a former colleague of someone in your circle. But how do you surface these opportunities? This untapped network you never knew you had represents lost opportunities.

### 04. Poor Timing and Missed Signals

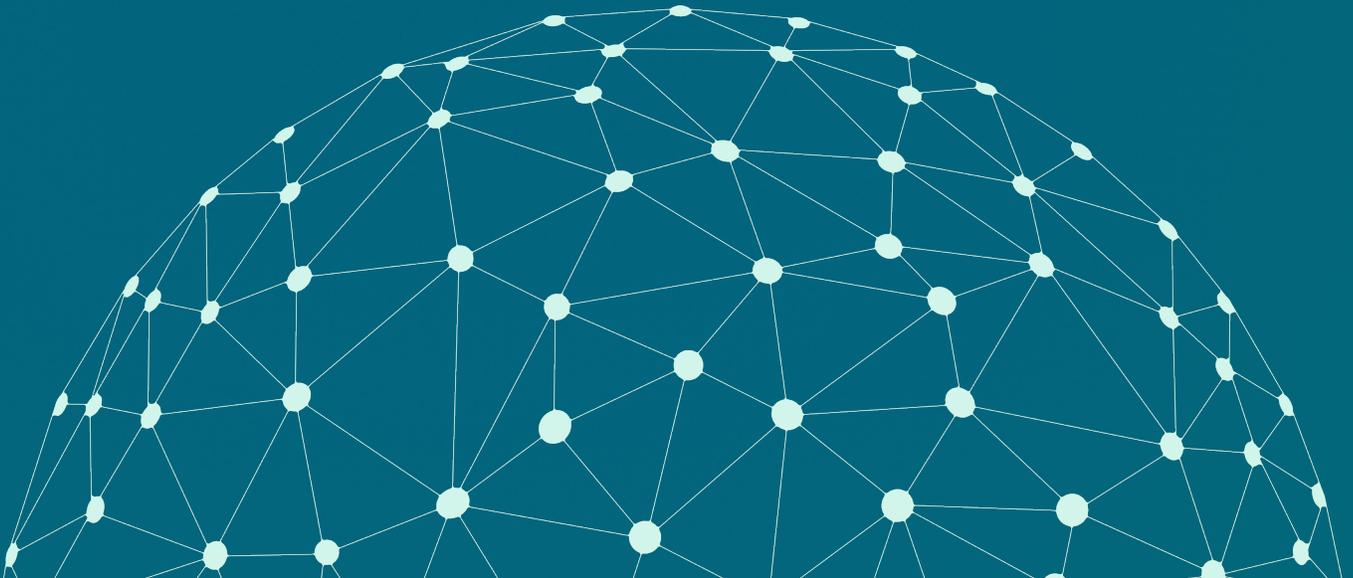
Without access to timely insights, advisors can miss critical moments. For instance, engaging a prospect after they've liquidated assets or just before they come into wealth can make all the difference. Many struggle to track these intent signals (like a business sale or job change) in a timely manner, if at all. The result is that outreach often comes too late or not at all. Greg King, Head of Wealth Management at FactSet, observed that advisors have long struggled both with finding new clients and "engaging with clients at the right time" – challenges that demand superb data and relationship insight to overcome.

## The Bottom Line

*When you can't reach your target audience or aren't connecting at the right time, organic growth becomes a grind. Scaling your practice requires relationship intelligence and actionable insights that reveal who to contact and when.*

SECTION 3

# The AI-Era Financial Advisor's Prospecting Playbook



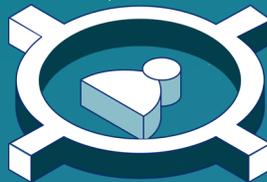
The most successful financial advisors target opportunities by acting on intent signals and money-in-motion events to connect with high net worth individuals.

With actionable strategies, tools, and templates, this playbook is your guide to Wealth Networking Intelligence (™) Playbook for building a scalable system for high impact organic growth.

## THE AI-ERA FINANCIAL ADVISOR'S PROSPECTING PLAYBOOK

- 01. Define Your Ideal Prospect Profile (IPP)**
- 02. Start with Who You Know and Grow from There**
- 03. Act on Intent: Move at Exactly the Right Time**
- 04. Build and Automate Your Prospecting Workflow**
- 05. Turn Top Clients Into Referral Engines**
- 06. Share Best Practices With Your Team**
- 07. Measure What Matters**

# 01. Define Your Ideal Prospect Profile (IPP)



Defining your Ideal Prospect Profile (IPP) is one of the most foundational steps in building a focused, effective business development strategy. It begins with a simple but crucial question:

## ***Who is your ideal prospect?***

While this might seem straightforward, many professionals spend surprisingly little time thinking about it deeply. To gain clarity, reflect on your existing client base. ***Among your current clients, who do you resonate with most strongly? Who do you deliver the most value to? These relationships often hold the key to identifying your sweet spot in the market.***

**An effective IPP should be built around a few key attributes that meaningfully impact the likelihood of client fit and long-term value.** These can include demographics that go beyond location and age to include attributes such as:

### **Profession**

Are you having more success with clients in a specific discipline, industry or field?

### **Education**

Certain educational backgrounds may correlate with higher income potential or specific industries.

### **Investable Assets**

What is the minimum or ideal asset threshold for your services to be impactful?

### **Interests**

Are there certain interests that you have that help you connect & relate with your clients? Do you target individuals with the same or similar interests?

### **Affiliations**

Membership in professional organizations, alumni networks, or philanthropic boards can signal influence, values alignment, and social reach.

### **Real Estate Ownership**

Property ownership – especially of multiple homes or investment properties – can be a powerful indicator of wealth and financial complexity.

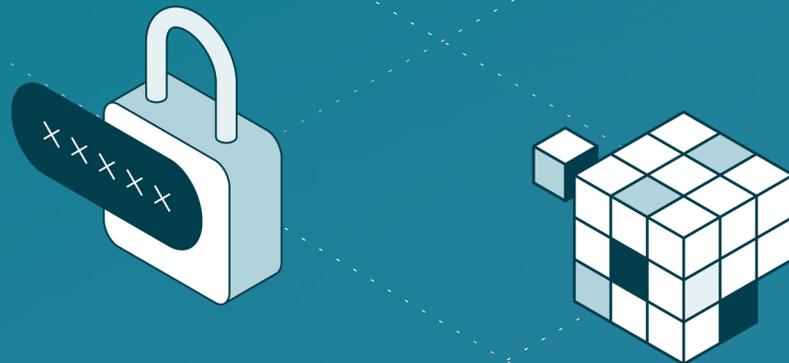
### **Career & Life Stage**

Are your ideal prospects early in their wealth-building journey, approaching retirement, or already retired? Married, single? Starting a family?



In today's data-rich environment, identifying ideal prospects goes far beyond instinct. By combining modeled wealth data with personal indicators – such as career changes, family status updates, or recent liquidity events – you can dramatically sharpen your targeting. This approach allows you to proactively identify individuals who match your IPP and may be entering a moment of need for financial guidance.

## 02. Start with Who You Know and Grow from There



With a better understanding of your IPP, the next step is to identify potential prospects that fit this mold and build a real list that makes sense for you. Most advisors think of prospecting as starting from scratch – cold leads, purchased lists, or open-ended outreach. **But your best future clients are likely already within reach.**

One of the most effective ways to grow your book of business is by tapping into the networks you already have – both personal and professional. These warm relationships are often overlooked but can yield the highest return.

## Personal + Professional Connections: A Powerful Asset

Every professional has two core networks:

### Personal Network

School Alumni

Club Affiliations

Community Members

Family Ties

### Professional Network

Colleagues

Vendors

Clients

Industry Peers

When you join these two networks together, surprising connections emerge. A client's former colleague might now be an ideal prospect. A fellow alum could sit on the board of a high-growth company. The key is knowing where to look – and having a strategy to act on what you find.

## How to Uncover New Opportunities in Your Network

Here's a simple process to surface hidden opportunities:

### 01. Start with Your Top Clients

These are your biggest advocates – and most connected allies.

### 02. Audit Their Visible Connections

Think about people they've worked with, partnered with, or know through school, nonprofits, or community roles.

### 03. Look for Overlap with Your Ideal Prospect Profile (IPP)

Are there shared affiliations, common interests, or life-stage alignments?

### 04. Strategically Map Warm Introductions

Don't go in cold – find the best path to make your approach relevant and timely.

## EXERCISE

### Client Network Audit

Take five of your best clients and ask yourself the following questions:

01. *Who do they know that fits my IPP?*
02. *What industries, schools, boards, or communities do they overlap with?*
03. *Can I see a natural path to reach out — either directly or with permission?*

Tools like LinkedIn or CRM history can be a decent starting point. But to go deeper – matching modeled wealth, personal contact details, and life triggers – solutions like Aidentified are essential.

## SAMPLE SCRIPT

### Asking for a Warm Intro

*“Hi [Client First Name], I noticed you’re connected with [Prospect Name] through [shared experience]. I think they could benefit from what we’re doing for you, and I would love the chance to connect with them. Would you mind if I mentioned your name in an introduction?”*

- Keep it low-pressure.
- Position it as helpful to the prospect.
- Always offer to return the favor.



### PRO TIP

Ask for referrals right after delivering great service or results – it’s when clients are most open to helping.

## NEXT STEP

### Smarter Network Mapping

If you want to take the guesswork out of relationship mapping, platforms like Aidentified use AI to automatically identify warm paths, reveal hidden affiliations, and deliver contact-ready data – all in one place.

Prospecting smarter doesn’t mean working harder – it means starting with who (and what) you already know.

## 03. Act on Intent: Move at Exactly the Right Time



You've built the right list. You know your ideal client. Now comes one of the most overlooked elements of successful prospecting: **timing**.

The best outreach happens when your prospect is already thinking about **change** – whether it's a new job, a financial windfall, or a career milestone. These life and career “triggers” create powerful windows of opportunity.

## Key Triggers That Signal Opportunity

Here are some of the top prospecting signals to watch for:

### Job Changes

- New roles often mean new financial responsibilities, retirement plan rollovers, or changes in compensation.
- Promotions or C-suite transitions can indicate readiness for more sophisticated planning.

### Liquidity Events

- Events like stock option exercises, real estate sales, or company funding rounds indicate “money in motion.”
- These signals often precede major decisions on taxes, investments, and long-term planning.

### Board Appointments or Promotions

- These signal credibility, visibility, and influence.
- Great timing for starting a conversation about legacy planning, philanthropic giving, or business advisory services.

Data shows that reaching out within **30 days** of a key event can increase open and response rates by up to **70%**. These moments are when your message is most relevant — and most welcome. But unless you’re manually tracking every prospect on LinkedIn and Google Alerts, timing can be hard to manage.

### That’s where automation and AI come in.

Smart platforms like Aidentified monitor hundreds of signals in real time – surfacing events the moment they happen, so you can act fast. See below for a list of wealth triggers that Aidentified monitors daily.

### Wealth Triggers

News Mention

Company Acquired

IPO & SPAC

Property Sale

Company Change

IPO Filings

Insider Stock Sales

Property Purchase

Job Title Change

Unicorn Status

Insider Stock Grants

Investment Received

Wealth Transfer

Insider Stock Purchase

## SAMPLE EMAIL TEMPLATES FOR EVENT-BASED OUTREACH

### Job Change Outreach

**Subject: Congratulations on the New Role!**

“Hi [\[First Name\]](#), I just saw your exciting news at [\[New Company\]](#) – congratulations! Transitions like these often bring new planning priorities, and I’d be happy to share how others in similar roles are approaching their financial strategies. Would you be open to a quick chat next week?”

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### Liquidity Event Outreach

**Subject: A Big Milestone – Let’s Connect**

“Hi [\[First Name\]](#), I came across news of your recent [\[funding round/real estate sale/stock event\]](#) – congrats on a major milestone! I work with professionals going through similar events and would love to explore if we might be a good fit. What’s your availability next week?”

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### Board Appointment Outreach

**Subject: Congrats on Your Board Appointment!**

“Hi [\[First Name\]](#), I noticed your new appointment to the board of [\[Org Name\]](#) – an impressive achievement! I specialize in helping professionals in advisory and leadership roles align their financial plans with their growing responsibilities. Would love to connect if the time is right.”

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Click [here](#) for the full list of warm email outreach templates.

## EXERCISE

### Build Your Trigger Plan

01. Choose 3–5 types of prospects from your Ideal Prospect Profile.
02. Match each one to 2–3 life or career triggers.
03. Draft outreach templates tailored to each event.
04. Set alerts (via tools or platforms like Aidentified) to monitor these signals at scale.

## BUILD REAL CONNECTIONS

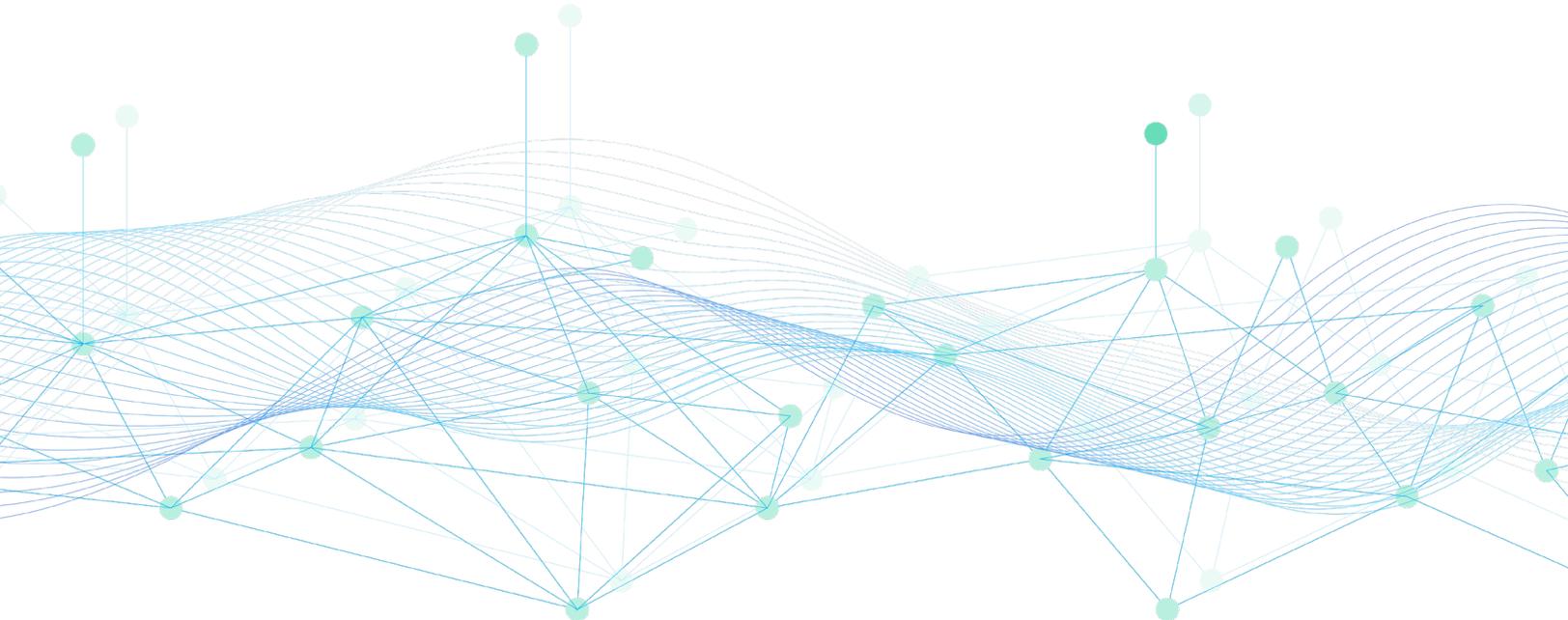
Trigger-based prospecting isn't just more effective, it's more human. It shows you're paying attention, that your timing is thoughtful, and that your outreach is grounded in relevance.

To track these moments at scale and in real time, platforms like Aidentified offer automated alerts across job changes, funding rounds, real estate events, and more — so you can always be first to reach out when it matters most.



### PRO TIP

Combine trigger timing with relationship mapping. If you can time your outreach and make it warm through a shared connection, your chances of conversion go way up.



## 04. Build and Automate Your Prospecting Workflow



Great prospecting isn't about working harder. It's about working smarter, consistently. In this module, we focus on turning everything you've built so far – your Ideal Prospect Profile (IPP), network mapping, and event triggers – into a repeatable system you can run daily or weekly.

Even 15 minutes a day of focused, automated prospecting can yield results... if your workflow is built right.

## STEP 1

### Digest Alerts Like a Pro

Intent signals and alerts (job changes, funding rounds, new board appointments, etc ) are only useful if you can act on them. Here's a simple framework for making the most of daily alerts:

#### 01. Skim First, Act Later

Scan all new alerts in your dashboard or inbox in under 5 minutes.

#### 02. Tag and Triage

“Hot” (reach out today)  
“Warm” (follow up this week)  
“Cold” (archive or revisit quarterly)

#### 03. Write or Queue Outreach

Block 15–30 mins daily to send outreach to top-priority leads.



#### PRO TIP

Tools like Aidentified provide alert feeds and automated tagging to help you organize daily signals quickly.

#### WEALTH TRIGGERS

- News Mention
- Company Change
- Job Title Change
- Investment Received
- Company Acquired
- Unicorn Status Achieved
- IPO
- IPO Filing
- Insider Stock Sales
- Insider Stock Grants
- Insider Stock Purchase
- Property Sale
- Property Purchase
- Potential Wealth Transfer

#### PERSONAL ATTRIBUTES

- Age
- Email (Personal)
- Email (Work)
- Phone (Mobile)
- Phone (Other)
- Career Information
- Household Member(s)
- Wealth Triggers
- Home Address
- Property Ownership
- Property Value
- Remaining Share Balance
- Medical Professionals
- Twitter
- Facebook
- LinkedIn
- Contains Notes

## STEP 2

### Tag, Score, and Prioritize Leads

To scale your outreach effectively, you'll need a lightweight system to score and segment your prospects.

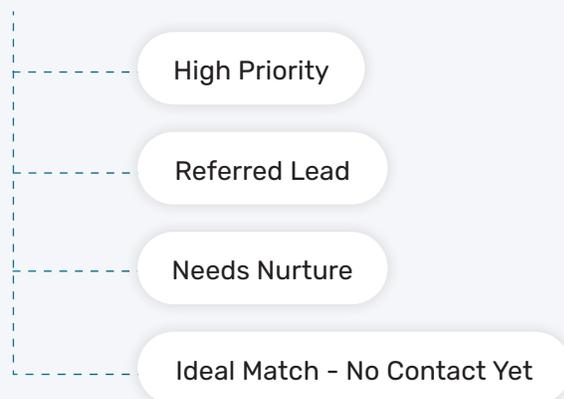
Think of this as your personalized "lead scoreboard."

#### SAMPLE SCORING CRITERIA

##### ATTRIBUTE

Matches IPP Perfectly	+3
Warm Intro Available	+2
Recent Event Trigger (30 days)	+2
High Verified Contact Quality	+1
Low Engagement/Cold Lead	-1

#### SAMPLE TAGS



#### PRO TIP

Use the tagging feature to better organize your leads based on prospecting stage, leave outreach cues for yourself, and for easier exports.

## STEP 3

### Plug Prospecting into Your CRM + Email Tools

Automation isn't just about alerts — it's about working where you already are. Here's how to seamlessly integrate your prospecting into your workflow:

#### 01. CRM Integration

Import lead lists and trigger events into tools like Salesforce, HubSpot, or Wealthbox. Set tasks to remind yourself (or your team) to follow up on key changes.

#### 02. Email Sequencing Tools

Use platforms like Mailchimp, Outreach, or Salesloft to create nurture sequences or one-off messages tied to specific events.

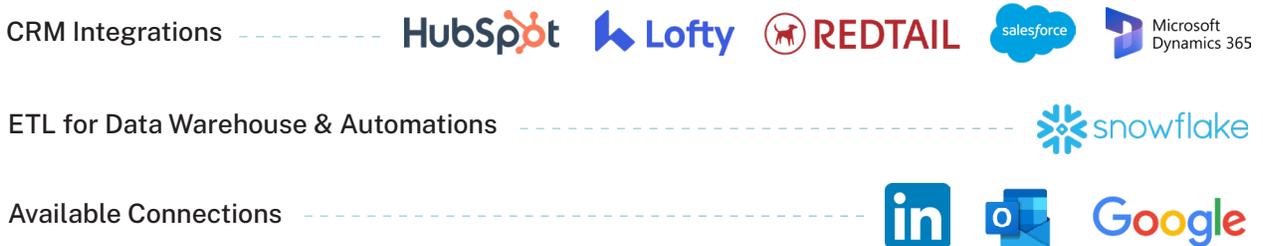
#### 03. Data-as-a-Service Feeds

Set up recurring enrichment or audience list pulls to keep your data current and actionable without manual work.



#### PRO TIP

Aidentified supports integration via CSV export, direct CRM syncs, and API access — flexible enough for any workflow.



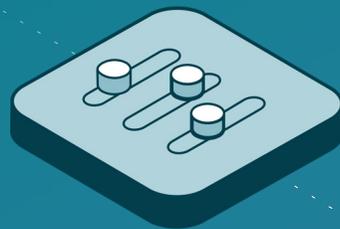
## STEP 4

### Your Weekly Prospecting Rhythm (Worksheet)

Use the following template to set your weekly cadence. Keep it light, consistent, and focused on outcomes — not volume.

DAY	ACTION ITEM	TIME BLOCK
Monday	Review alerts, tag leads, update CRM	30 min
Tuesday	Send warm outreach emails	45 min
Wednesday	Review referral paths & request intros	30 min
Thursday	Build new lists based on IPP filters	45 min
Friday	Check follow-ups and schedule next week	30 min

# 05. Turn Top Clients into Referral Engines



Your best clients aren't just a source of revenue – they're the gateway to your next 10 best clients. Yet most advisors either hesitate to ask for referrals or wait for them to happen organically. That's a missed opportunity.

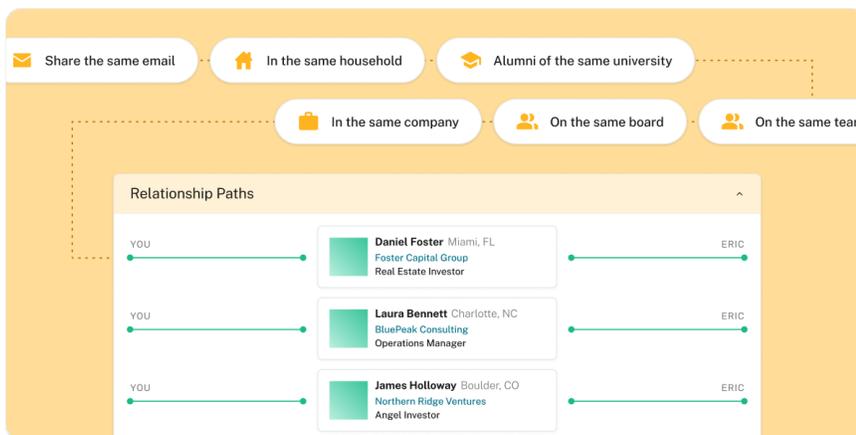
In this module, we'll show you how to use relationship intelligence to proactively – but naturally – turn satisfied clients into strategic referral engines.

## STEP 1

### Map Your Clients' Networks

Your top clients are connected to people just like them: high-income professionals, business owners, community leaders. But without the right tools, uncovering those connections can feel like guesswork. Here's where relationship mapping comes in:

- Platforms like Aidentified use AI to map each client's professional and personal networks.
- You can see how they know each other — shared employers, board service, alumni groups, even real estate proximity.
- Filter their connections by net worth, job title, industry, or geography to find “referral matches.”
- This gives you a targeted list of ideal prospects — and a warm relationship path to each.



Access a broader professional network.



Discover new paths to referrals.



Build a powerful wealth network.

## STEP 2

### Create “Referral Match Lists”

01. Identify 5–10 of their top connections who match your Ideal Prospect Profile (IPP).
02. Note how they're connected (coworkers, classmates, etc.).
03. Use this insight to create a custom referral match list with a clear narrative (e.g., “Here are a few people in your network who share similar financial profiles or career paths — would you be open to helping me connect?”).

This isn't a generic “do you know anyone” ask — it's specific, relevant, and respectful of their time and trust.

## STEP 3

### Ask for Introductions – Naturally

**Here's the key: don't make it transactional.**

Position your ask as a value-add for their network.

#### Timing Tips

- After a successful planning session
- When they've expressed satisfaction
- Around life events (birthdays, job changes, liquidity)

#### Sample Script 1 – Professional Peer Intro

*"[Client Name], I really enjoy working with professionals like you, and I noticed you're connected to [Prospect Name] from your time at [Company/School]. I think there's a good fit based on what I know about them. Would you feel comfortable if I mentioned your name when reaching out?"*

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#### Sample Script 2 – The “Help Them” Approach

*"[Client Name], one of the ways I grow my practice is by working with people who value trust and guidance like you do. If you ever have a colleague or friend navigating a major financial decision, I'd be happy to be a resource — even just to answer questions."*

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#### Sample Script 3 – Post-Review Window

*"After our review today, it's clear we've made great progress. If there's anyone in your circle who could benefit from this kind of planning, I'd love the opportunity to support them as well."*



## PRO TIP

Aidentified's unique Relationship Mapping feature automatically generates paths to referrals for you based on your connections - so you can do this weekly in minutes.

## EXERCISE

### Referral Expansion

1. Choose 3 of your best clients.
2. Use your relationship data tool (or a manual LinkedIn scan) to uncover 5 key connections each.
3. Write down how they're connected, why they're a good fit, and a warm introduction script for each.

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## BONUS

**Your clients know your future clients. You don't have to build your network from scratch – you're already connected to it.**

There is also value in identifying and tracking potential future clients: individuals who may not need your services today, but are on a clear trajectory to benefit from them. Building and maintaining these lists ensures you're positioned to engage when the time is right.

Turning top clients into referral engines is the fastest, most efficient way to grow – and with relationship intelligence on your side, you can pursue both warm introductions and forward-looking opportunities strategically, respectfully, and at scale.

## 06. Share Best Practices With Your Team



Prospecting works better when it's not just one person's job. The firms seeing the best results treat it like a team sport. Advisors, and support staff like marketing, all playing a part in finding, nurturing, and closing high-value prospects.

In this module, you'll learn how to get your whole team involved in prospecting and use tools like Aidentified to make it actually work.

## SUPPORT STAFF & SALES ASSISTANTS

### Multiply Capacity

Support staff can be trained to:

- Research and pre-qualify leads based on Ideal Prospect Profiles.
- Use data platforms to pull contact info, wealth insights, and background intelligence.
- Monitor job changes, news mentions, and alerts for timely outreach opportunities.



#### PRO TIP

Create “opportunity folders” for each lead, with full contact data + recommended next steps.



#### PRO TIP

Integrate platforms like Aidentified into your email and CRM stack to personalize at scale.

## MARKETING TEAMS

### Fuel Your Funnels

Marketing can turn intelligence into high-performance campaigns:

- Launch drip email campaigns targeting specific attributes (e.g., executives in biotech).
- Run lead nurturing based on real-time behavior signals.
- Enrich inbound leads with data to automatically route to the right advisor.

## JUNIOR ADVISORS

### Practice + Progression

For newer advisors, prospecting is often the best training ground. With data-backed tools, they can:

- Build targeted prospect lists for assigned territories or industries.
- Run outreach campaigns to specific segments (e.g., recent job changers).
- Practice event-based messaging using triggers like funding, relocation, or promotion.



#### PRO TIP

Assign “trigger tracking” to junior advisors — have them act on daily alerts from your prospecting platform.

## How to Use Aidentified Across Roles

Whether you're prospecting solo or running a multi-person team, Aidentified's tools are built for collaboration:

### Web App

Full-featured search, list-building, and trigger monitoring.

### Chrome Extension (Sidecar)

See contact and relationship data while browsing LinkedIn, websites, or news.

### Data-as-a-Service (DaaS)

Push enriched profiles into your CRM, email tool, or data lake.

## Bonus Workflow Ideas

- **Daily “trigger huddle”** – Review alerts as a team and assign follow-ups.
- **Prospecting contests** – Gamify outreach and lead conversion.
- **Lead library** – Maintain a shared list of warm leads with contact history.

## EXERCISE

### Build Your Team Prospecting Plan

- 01.** List your team's current roles (e.g., advisor, assistant, marketer).
- 02.** Identify one prospecting task each can own weekly.
- 03.** Document the tools and workflows that support their contributions.
- 04.** Review outcomes monthly to optimize the rhythm.

Treat prospecting like a team sport and you'll not only generate more leads — you'll build a more scalable, efficient growth engine. With clear roles, smarter tools, and shared visibility, your practice becomes a prospecting machine.

## 07. Measure What Matters



Tracking your numbers matters. But prospecting isn't just about how many calls you made or emails you sent. If you want consistent organic growth, you need to measure the KPIs that actually contribute to new business.

In this module, we'll cover the metrics that matter most, how to track them without overcomplicating things, and how your day-to-day work connects to real revenue down the line.

## Core Prospecting KPIs to Monitor

### Connections Made

*Are your efforts growing your network in meaningful ways?*

- New qualified prospects identified
- Warm introductions generated
- High-value leads added to CRM

### Meetings Booked

*Are your messages converting to conversations?*

- Intro calls or discovery meetings scheduled
- Event-based outreach conversion rate
- Time from trigger to first contact

### Opportunity Velocity

*Are leads progressing through your funnel?*

- Average time from contact to opportunity
- % of leads moving to proposal or engagement stage
- Value of pipeline influenced by recent prospecting activity

## Tracking the Full Funnel: From Trigger to Revenue

The smartest firms don't just track leads — they track the whole journey:

STAGE	METRIC TO TRACK
Trigger Detected	Alerts received (job changes, funding, news mentions)
Action Taken	Outread messages sent within 7 days
Engagement Achieved	Replies, meetings booked, referral requested
Opportunity Created	New Prospect added to CRM/opportunity stage
Revenue Influenced	Deals closed from prospecting-driven activity



## PRO TIP

Use tags in your CRM (e.g., “trigger: job change”) to tie outcomes back to triggers.

## SAMPLE DASHBOARD ELEMENTS

Whether you’re using a CRM, spreadsheet, or platform dashboard, here are fields worth tracking:

- **Lead Source** — Trigger type or relationship path
- **Prospect Tier** — A/B/C or by investable assets
- **Time to First Touch** — How fast you’re acting on alerts
- **Touch Count** — Emails/calls before reply
- **Stage Progression Rate** — % from intro to meeting, to proposal
- **Win Rate by Trigger Type** — Which signals convert best

## EXERCISE

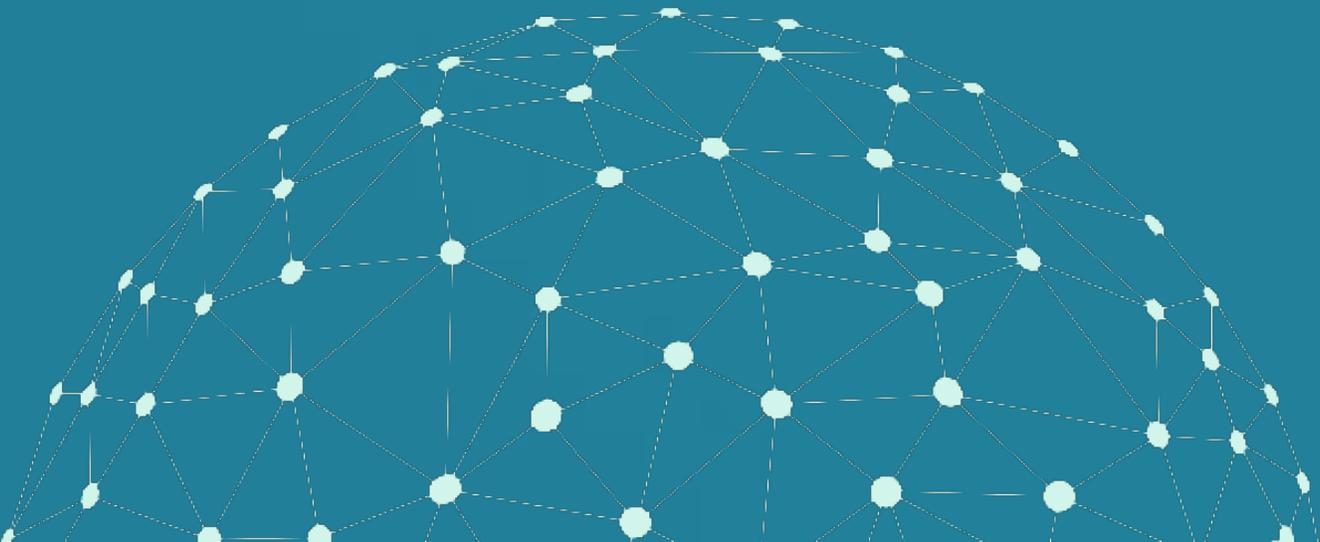
### Build Your Prospecting Scorecard

01. Choose 3 KPIs to track weekly.
02. Create a spreadsheet or CRM view to monitor progress.
03. Review every Friday — what worked? What stalled?
04. Refine next week’s plan based on results.

When you know what works, you can do more of it. A consistent tracking rhythm helps you refine your message, double down on high-converting triggers, and identify where you’re losing steam.

SECTION 4

# Aidentified & Wealth Network Intelligence(™)



Aidentified is an AI-powered prospecting platform built specifically to turn the above challenges into opportunities. It combines comprehensive people data with relationship mapping to reveal how you are connected to prospective clients and when to reach out for maximum impact. In essence, Aidentified’s Wealth Network Intelligence approach merges wealth intelligence (e.g. real-time financial events, inferred net worth, lifestyle attributes) with network intelligence (who-knows-whom, relationship strength) – all in one unified tool.

Here are the key facts about Aidentified’s platform:

## 01. Massive Enriched Database

Over 300 million individual profiles (consumer and professional) are aggregated, giving you an unprecedented pool of prospects. Imagine having the breadth of LinkedIn, Facebook, and public records combined – that’s the level of insight available. Every profile is enriched with career history, wealth indicators, interests, and more, so you can truly know your prospect before the first call.



**75+ million  
Professional  
Profiles**



**260+ million  
Consumer  
Profiles**



**14 million  
Company  
Profiles**



**200  
Attributes**

			Wealth Triggers	
		Professional	News Mentions	IPO Filings ★
	Household	Company	Company Change	IPO & SPAC ★
Personal	Home Ownership ★	Job Position	Job Title Change	Insider Stock Sales ★
Email	Home Value ★	Education	Investment Received	Insider Stock Grants ★
Phone	Area Tex Profile	Career History	Company Acquired	Insider Stock Purchase ★
Age	Marital Status	Income Ranges ★	Unicorn Status ★	Property Sale ★
Interests	Children ★	Wealth Segments ★	Wealth Transfer ★	Property Purchase ★

## 02. AI-Driven Relationship Mapping

Aidentified has mapped billions of connection paths between individuals. It scours both professional networks and personal affiliations to find the warmest path to your target. Whether a prospect is a former colleague of one of your clients, serves on a nonprofit board with your neighbor, or even lives on your street, Aidentified will highlight that connection. These relationship insights turn cold outreach into warm introductions at scale.

## 03. Timely “Money-in-Motion” Signals

The platform continuously monitors news and events for triggers like liquidity events, job changes, funding rounds, and real estate transactions. Whenever a prospect or client in your network hits a major milestone (e.g. sells a company or receives a large investment), you get an alert. This ensures you reach out at the right time, with the right context, to be first to congratulate and advise – ahead of your competition.

## 04. Advisor-Friendly Interface

Despite its tech horsepower, Aidentified is designed for ease of use by advisors. You can build highly targeted lead lists in minutes through a simple filter interface. Relationship paths are displayed clearly, and daily alert emails keep you updated without needing to dig. It’s technology that feels approachable, not overwhelming – a friendly co-pilot for your business development efforts.



***Smarter Data.  
Stronger Relationships.  
Bigger Wins.***

**That’s Aidentified’s promise. Let’s break down how you can put this into action in your day-to-day prospecting.**

## SECTION 5

# Next Steps Organic Growth at Scale

You've seen how better data, intent signals, and stronger relationships can supercharge your organic growth. Now it's time to put this playbook into action for your own practice.

*Aidentified is here to help you every step of the way.*

01

### Take a Test Drive

See Wealth Network Intelligence(tm) in action with a personalized demo. In 20 minutes, you'll see how to find warm leads tailored to your goals and get all your questions answered in real time.

**Book your demo** and see what smarter prospecting feels like.

02

### Use Your Network to Grow Your Network

Think about one high-value client or contact you have.

There are opportunities hiding in their network right now. With Aidentified, you can start uncovering them today.

Reach out to learn how we help you map and monetize your existing relationships.

03

### Supercharge Your Practice

Aidentified isn't new. It's a proven solution trusted by industry leaders, top firms and wirehouses.

Every day you wait, your competition could be making connections without you.

Time to get started.

## Ready to scale your organic growth capabilities?

Access industry-leading relationship mapping, money-in-motion alerts, and wealth intent signals. Let's get to it!

