



Solution Overview

Financial Advisory Practice Acquisition Marketplace

2025



ProspectIQ.ai Financial Advisory Practice Acquisition Marketplace Overview

Introduction

Harnessing the power of artificial intelligence, ProspectIQ.ai has built a marketplace that connects financial firms that are looking to purchase financial advisory practices with leaders of firms that are looking to be acquired. Today, some of the largest financial advisory firms in the world participate daily in this bespoke marketplace.

Marketplace Size – 5.6 Trillion Dollars

Our AI large language model has determined that the financial acquisition marketplace consists of over 15,000 potential meetings between buyers and sellers. As the average seller has 376M in AUM, this represents a 5.6 Trillion dollar opportunity that is growing daily.

Our Commonwealth Sub-Marketplace is also a robust and growing space with over hundreds of millions of dollars in AUM up for grabs.

Marketplace Overview

PIQ operates an AI driven Financial Advisory Practice Recruitment marketplace that facilitates direct high-fit connections between qualified buyers and sellers through curated meetings.

Using advanced matching algorithms and behavioral signals, we identify your best prospects and deliver real conversations that move deals forward— not just leads.

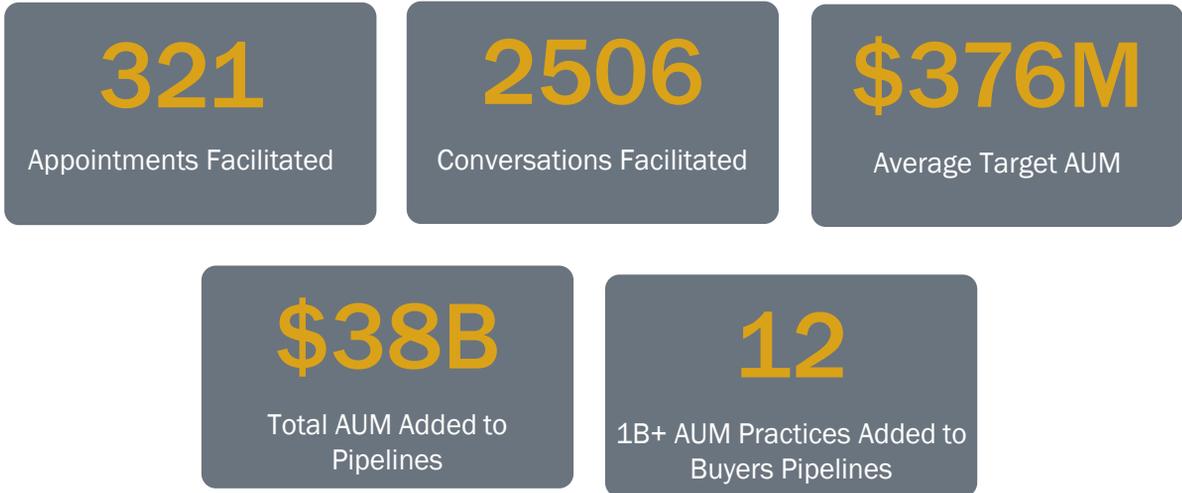
Our model streamlines pipeline development by replacing broad outreach with precision-matched sales qualified conversations.

It's like a matchmaker for your sales and revenue teams as it is able to get you in front of the right prospects, faster and more cost efficiently.



ProspectIQ.ai Financial Advisory Practice Acquisition Marketplace Overview Cont.

2025 Performance To Date: Key Marketplace KPIs



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Some of the largest financial firms in the United States are current market participants. To join this vibrant marketplace and enjoy unparalleled deal flow, visit www.prospectiq.ai.

We look forward to working with you to meet your practice recruitment goals.