

Solution Overview

Participating in a Financial Advisory Practice Acquisition Marketplace

2025



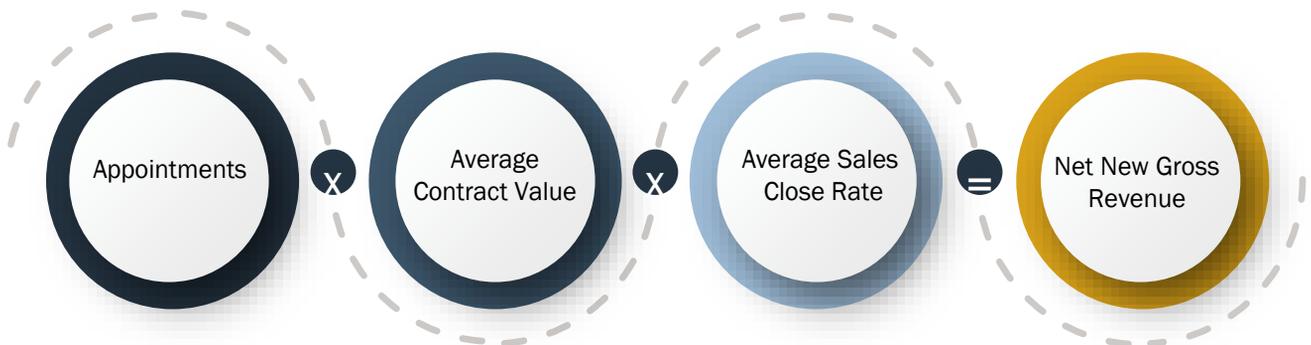
ProspectIQ,ai Cyber-Security Solution Overview

Introduction

ProspectIQ employs AI to help companies develop marketplaces where they can interact with their best prospects and book appointments at scale with firms that are looking to be acquired.

Its All About the Appointments

When acquiring advisory practices to help you increase your AUM, your average purchase price and deal close rate is relatively fixed by the market. You have much greater control over the number of appointments you perform with firms looking to be acquired. As such, AUM Growth is largely dependent on appointment performance. Its actually a simple concept, the more appointments you perform, the more your AUM will increase!



The Problem

You have a great platform that would be attractive to many firms.

But getting them to speak with you is fraught with problems and can be outrageously expensive with the average **PERFORMED APPOINTMENT COSTING OVER \$3000** no matter which demand generation approach is used.

Lack of demand generation is the reason most firms fail to grow.



ProspectIQ.ai Financial Advisor Practice Acquisition Marketplace Overview

Our Solution

ProspectIQ.ai uses AI to help financial firms establish bespoke marketplaces where they can identify, interact and book appointments with the leaders of practices that are looking to be acquired. Market participants regularly speak with 50 firms a month that are exploring acquisition options.

Building a Bespoke Practice Acquisition Marketplace

1

First, we have created a data universe filled with over 50,000 leaders of financial firms that might be acquisition targets. -

2

Second, we use our AI engine to identify the professionals in that universe that tightly match your ideal target profile AND are most likely to pick up their phone, learn about your platform and then book an appointment with your sales team

3

Third, once your bespoke acquisition marketplace is established, we activate it to generate you appointments at scale. Using outbound callers and advanced AI, we can deliver you as many appointments as you need, whether it is 20 a month or 200 a month. We are the only solution that can guarantee a specific number of performed, not booked, performed appointments per month.

Joining our Practice Acquisition Marketplace

Today, the Financial Advisor Practice Acquisition Marketplace is facilitating hundreds of meetings between buyers and sellers. Some of the worlds largest firms are participants and have put over 30B into their pipeline in the last quarter alone. To participate, simply speak with a Practice Acquisition specialist.