AdvizorPro Unveils Family Office and Advisor Teams Modules to Enhance Sales and Marketing Capabilities

Leading Financial Services Data Platform Unveils Family Office and Advisor Teams Modules to Enhance Sales and Marketing Capabilities With More Coming in 2024

ATLANTA, GA, USA, December 7, 2023 /EINPresswire.com/ -- AdvizorPro, the premier provider of B2B contact and company information in the financial services ecosystem, is pleased to announce the launch of two significant data modules: family offices and wealth teams. These additions mark a significant expansion of AdvizorPro's industry coverage and underscore the company's commitment to being the go-to resource for sales and marketing intelligence within the financial services space.

The Family Office Module represents a major stride in addressing the demands of the opaque family office market. With intelligence on over 1,200 family offices and their key contacts, the dataset offers a comprehensive view of multi and single family offices, allowing clients to identify opportunities based on asset size, asset class interest, decision-maker titles, geography, and more. Leveraging advanced technology and a team experienced in the family office space, AdvizorPro provides unparalleled depth and quality of data in this challenging sector.

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>
> *Michael Magnan*

Simultaneously, the new Advisor Teams Module provides an in-depth analysis of large financial aggregators and wirehouses, mapping an impressive 24,000 teams to date. This detailed information equips AdvizorPro clients with the intelligence needed to strategically map and engage with key wealth teams that may have been challenging to identify otherwise. AdvizorPro

believes this to be the largest and most accurate offering of advisor teams data currently available in the market.

Michael Magnan, CEO of AdvizorPro, commented on the company's achievements in 2023, stating, "This year has been pivotal for AdvizorPro. We've made key enhancements that firmly position us as the leading data platform in the industry. The enthusiastic responses from our clients to our innovations have brought a lot of excitement and validation to our entire team. Innovation is at the heart of who we are, and we're thrilled about the exciting plans we have in store for 2024 and beyond."

AdvizorPro has consistently demonstrated a commitment to innovation, with notable platform enhancements throughout 2023, including A.I. list matching, significant email coverage improvements, breakaway advisor tagging, expanded coverage of insurance producers in new states, and much more.

Looking ahead, AdvizorPro has ambitious plans for 2024, with new data modules on the roadmap, including bank/trust data, a deepening of the family office database, and expansion into additional institutional channels. The company is poised to further extend its reach into new verticals within the financial services space, utilizing technology and its skilled data team to enhance the depth of intelligence offered on its dataset.

For more information about AdvizorPro and its comprehensive financial services data platform, please visit http://advizorpro.com.

About AdvizorPro:
AdvizorPro is the leading provider of B2B contact and company information in the financial services ecosystem. Its platform features tens of millions of data points on financial advisors, family offices, and insurance producers, empowering customers to enhance their sales, marketing, and recruitment efforts. AdvizorPro serves asset managers, SaaS companies, insurance carriers, IMO/FMOs, and recruiters.

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