



AdvizorPro's Half-Year Recap Showcases Significant Enhancements to Intermediary & Investor Database

ATLANTA, GA, UNITED STATES, July 31, 2024 /EINPresswire.com/ -- AdvizorPro, a leading provider of comprehensive and accurate data for financial professionals, is proud to announce significant milestones achieved in the first half of 2024. The company's mission to provide the most user-friendly platform for connecting with investment professionals has led to major advancements in its intermediary & investor database.

"I'm thrilled to reflect on the progress we've made so far this year," said Hesom Parhizkar, Cofounder & CTO of AdvizorPro. "Our talented team has worked tirelessly to innovate and improve our platform, and we're grateful for the instrumental feedback and guidance from our valued clients. We're excited to continue our momentum and achieve even greater success in the months ahead."

□ Key Highlights of the First Half of 2024:

□ New & Enhanced Datasets: AdvizorPro released new datasets, including Private Wealth Teams, Family Office, & Bank & Trust Companies.

□ Release of Contact Algorithm 3.0: The proprietary artificial intelligence algorithm was updated to collect and validate key contact information with higher accuracy.

□ Enhanced Contact Profiles: Hundreds of thousands of headshots and bios were added to contacts throughout the platform.

□ User Interface Refresh: The company redesigned its user interface to improve usability, appearance, and search functionality.

□ New Contact Search Filters: Users can filter contacts by seniority, investment committee, hobbies & sports teams, and awards & accolades.

□ Evolved Insights in Firm Profiles: Key insights, updates, and intelligence are now available in one place.

□ Tagging of Breakaway Advisors: A new 'Breakaway Advisors' tab was added to the dashboard,

providing visibility into advisors who have left wirehouses to join or start their own RIAs.

□ Non-Advisor Logic Enhancement: The "non-advisor" tagging logic was refined to include additional securities licensed professionals who are not practicing financial advisors.

□□ What's Next?

AdvizorPro is excited to share its product roadmap for the remainder of the year, focused on solidifying its position as the leading database of financial professionals. Upcoming features include:

□ Lead Scoring: Dynamically rank contacts based on their perceived value to your organization with custom scoring.

□ AI Chat: An AI chatbot will enable users to ask questions and automatically filter and refine results.

□ List Matching Enhancement - Company Level: Upload a list and match it with a list of companies, rather than just individual contacts.

□ Additional Datasets: New datasets will be added in the coming months to further enhance the product suite.

About AdvizorPro

AdvizorPro is a leading provider of comprehensive and accurate databases for financial professionals. The company's mission is to provide the most user-friendly platform for connecting with investment professionals.

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