

Accupoint Partners with SFS to Launch SFS-Accupoint TeamIQ one of the Most Comprehensive Advisor Team Data Solutions

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-- [AccuPoint](#) Solutions, an innovative industry data provider with extensive information on Financial Advisors, Insurance Agents, and firms distributing financial and insurance products and services has partnered



with [SFS](#), a fintech leader in sales reporting and data analytics, to provide the asset management industry with TeamIQ, one of the most detailed and comprehensive solutions for Advisor [Team](#) information.

The SFS-AccuPoint TeamIQ data enhances the intelligence on individual advisors, providing visibility into an Advisor's associations with other Advisors and certain non-advisor team members. TeamIQ provides critical data about an Advisor's team, tracks Advisors who are on multiple teams, and follows advisors who move between teams and firms.

Gary Weber, Founder & CEO of AccuPoint Solutions, said, "Since 2016 AccuPoint Solutions has been a leader in providing boutique and Fortune 500 asset management firms, insurance carriers, IMOs/FMOs, and industry service providers with digital distribution, data, and consulting solutions. Our partnership with SFS to create and deliver TeamIQ extends our capability to provide this unique product offering to the industry." Weber continued, "TeamIQ will aid firms in identifying and targeting the right individuals within an Advisor team. This improves a firm's ability to form relationships with the right Advisors, and with the individuals within a team that are most likely to promote the firm's products."

Aaron Wong, SFS MARS Product Manager stated, "SFS has focused on providing innovative solutions to solve the industry and business challenges of Asset Management companies. Whether it's through the capabilities of our MARS platform which is used by top 50 AUM firms to transform sales and asset data into actionable business intelligence or our Optimal Data service, SFS has been instrumental in helping our clients drive sales and grow assets. Our partnership with AccuPoint to deliver TeamIQ, complements the services we currently provide while creating a new and unique service which combines the technology and industry expertise of both

organizations to address a challenge within the industry.”

The SFS-AccuPoint TeamIQ solution includes Advisor Team information for all major wirehouses and includes critical information not readily available including: contact information for all team members, title/roles, areas of focus, social media links, and much more.

About AccuPoint Solutions

AccuPoint Solutions is an innovative industry data provider offering extensive information on Insurance Agents, Financial Advisors, and Firms distributing insurance and financial products. More information about AccuPoint Solutions can be found at: www.accupointsolutions.com.

About SFS MARS

SFS MARS is a fintech leader in sales reporting and data management for asset management firms. With a suite of advanced tools, including the Optimal Data service, SFS enables firms to optimize their sales and marketing strategies, ensure data accuracy, and gain deep insights into their market performance. Trusted by top 100 AUM asset managers, SFS continues to innovate and provide cutting-edge solutions for the evolving financial landscape. More information about SFS can be found at: www.sfsmars.com.

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