RIA CHANNEL®



2026

DISTRIBUTION PLAYBOOK

LEAD GENERATION FOR THE FINANCIAL SERVICES INDUSTRY

RIAChannel.com

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WHO WE ARE & WHAT WE OFFER

RIA Channel® delivers more advisor engagement and true intent data than any other provider.

RIA Channel® is the leading financial services marketing company specializing in connecting asset managers with financial advisors. We provide data-driven, lead generation strategies, augmented with the most robust advisor intelligence and data available. We are the largest provider of investment webcasts in the industry.

450,000+
Audience of Financial Professionals

300+
Live Events Each Year

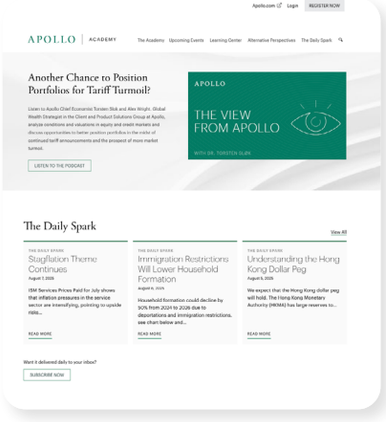
200,000+
Registrants Annually

$20T
Representative Audience Assets

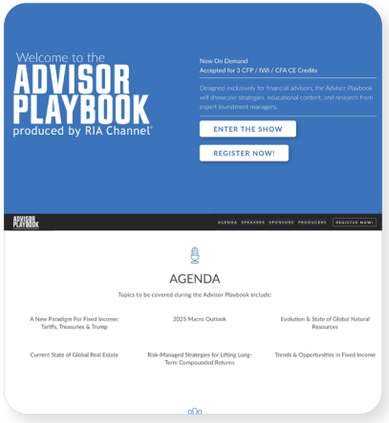
Advisor Engagement Across All Platforms



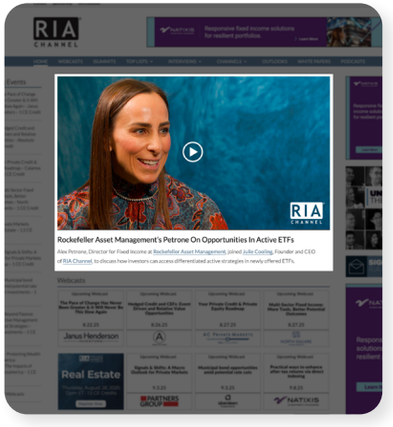
Webcasts



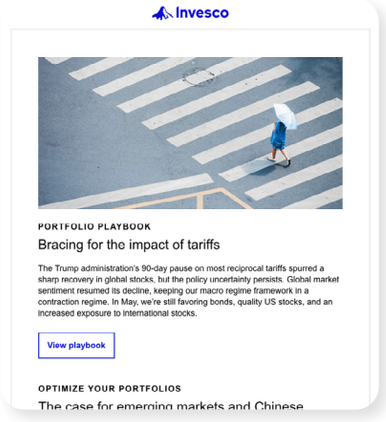
Learning Systems



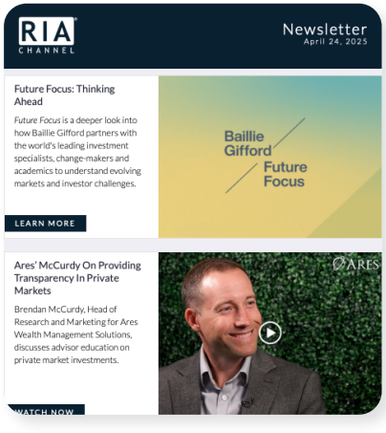
Events



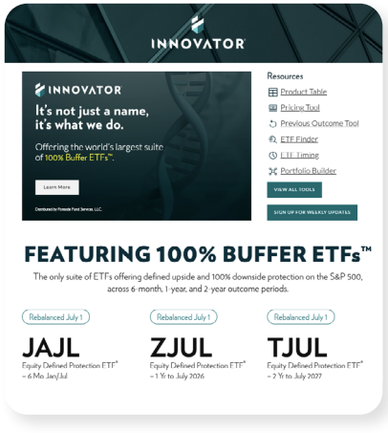
Videos



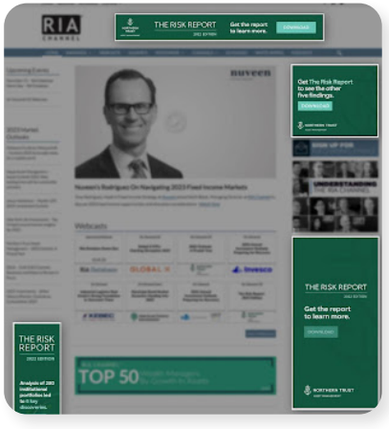
Dedicated Emails



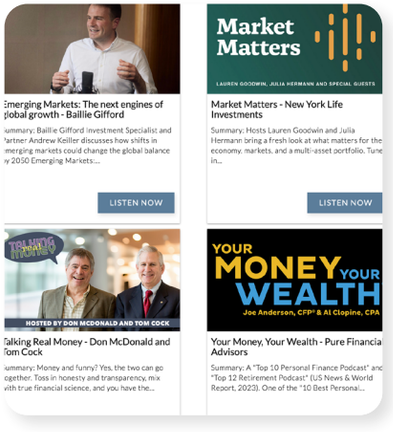
Newsletters



Custom Content



Ads



Podcasts

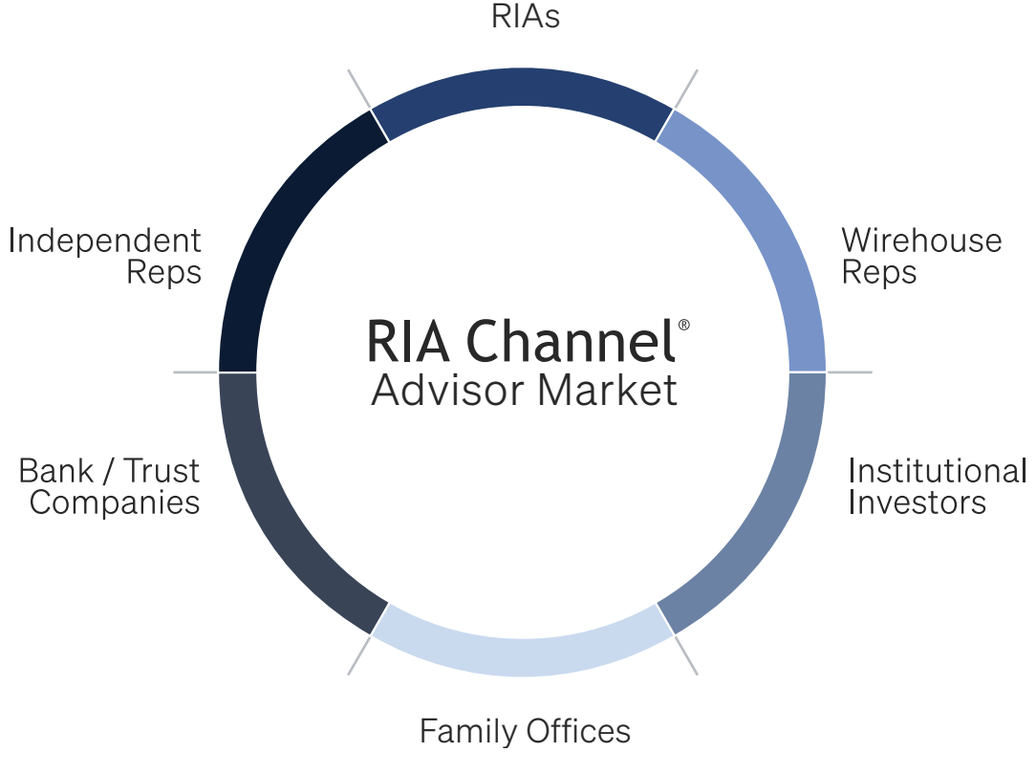


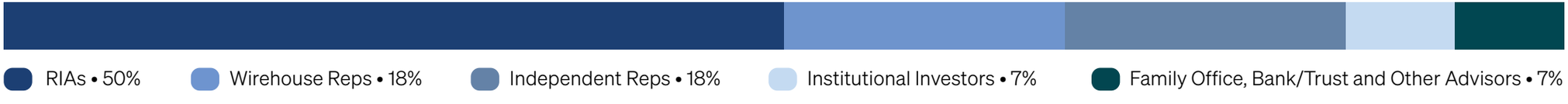
Print

RIA Channel® reaches 450,000+ financial professionals.

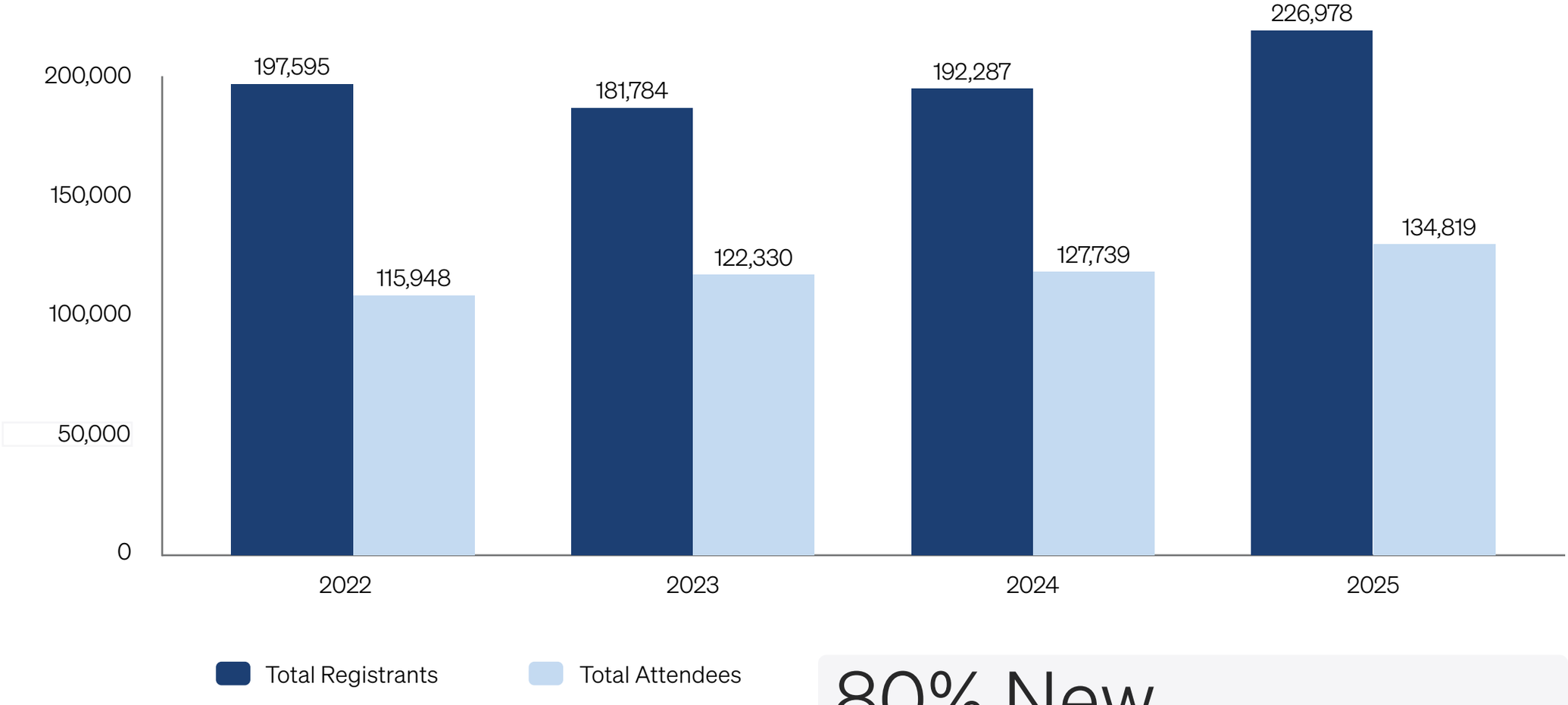
Advisor Market Reach

RIA Channel® reaches the largest financial professional audience - more than any other firm. As a data company, we are experts in identifying advisor movement, new firms, newly registered professionals and industry consolidation. This is critical for audience integrity. We are also the oldest and largest third-party producer of investment research webcast content. We have more double opt-in advisor emails than any other provider. With over 150,000 unique advisor registrants per year, we also have the highest level of audience engagement in the industry. Our targeting capabilities are limitless.





RIA Channel Audience Metrics



80% New

Repeat clients can see an average of 80% new advisor registrants each webcast

RIA Channel® Opt-In Audience

450K+ Financial Professionals

18.5K Wealth Management Firms

$6T Wealth Management Assets

$4.5T Total U.S. ETF Assets

26,000+
RIA Firms

16,500+
Firms Using Alts

7,000+
Firms using ETFs

5,600+
Firms with Crypto Interest

4,100+
Active ETF Users

Institutional Market Reach

35,000+
Institutional Contacts

11,000+
Institutional Firms

7,000+
Foundations & Endowments
($50M+ Assets)

1,800+
Wealth Management Teams ($1B+)

400+
U.S. Public Pensions ($1B+)

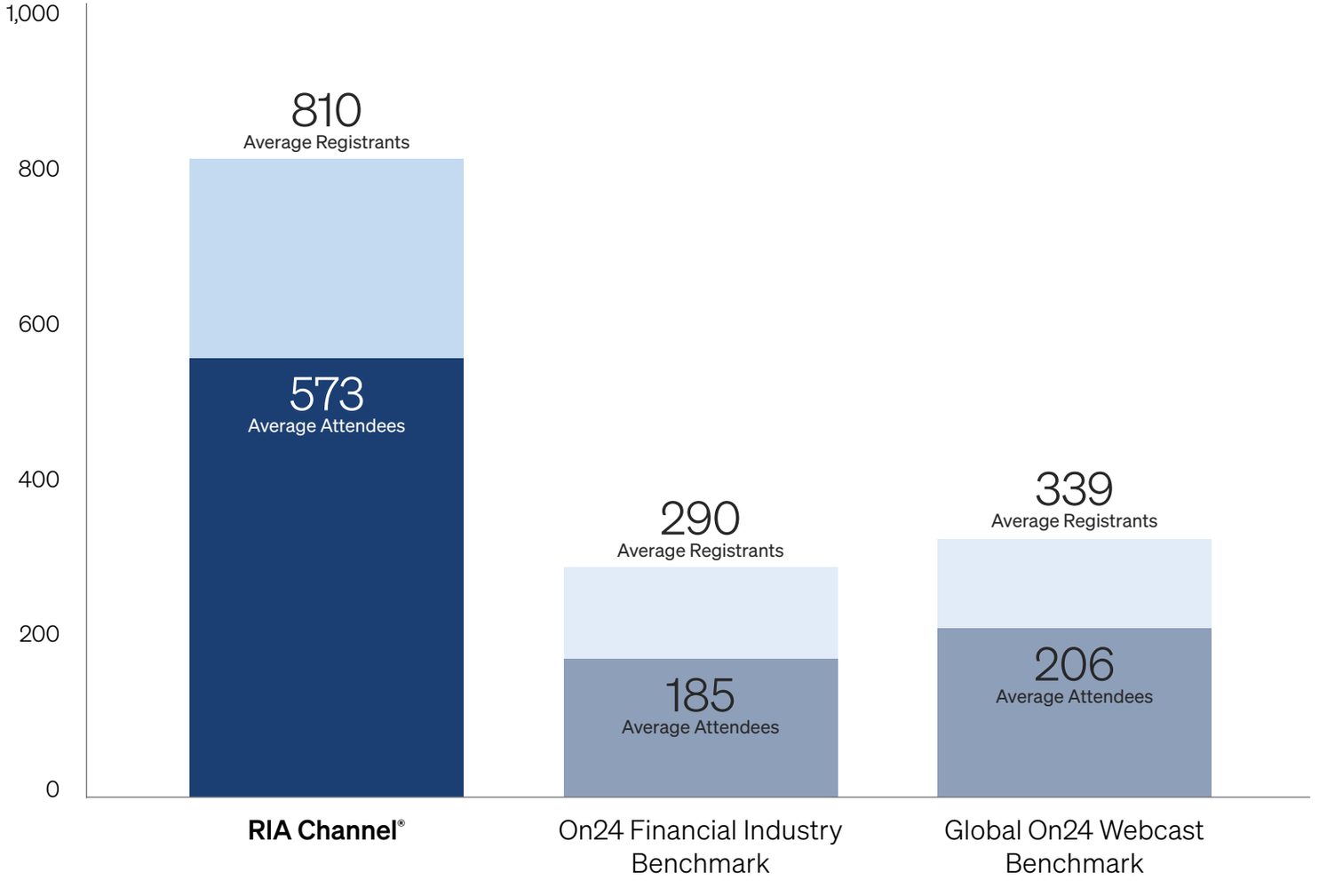
1,300+
Taft Hartley

100+
Sovereign Wealth Funds

2,500+
U.S. Private Pension Plans
(With greater than 500 plan participants)

500+
Investment Consultants/OCIOs

RIA Channel® Webcasts Outperform



RIA Channel Delivers:

2.5x
The Financial Industry Benchmark Average Registrants

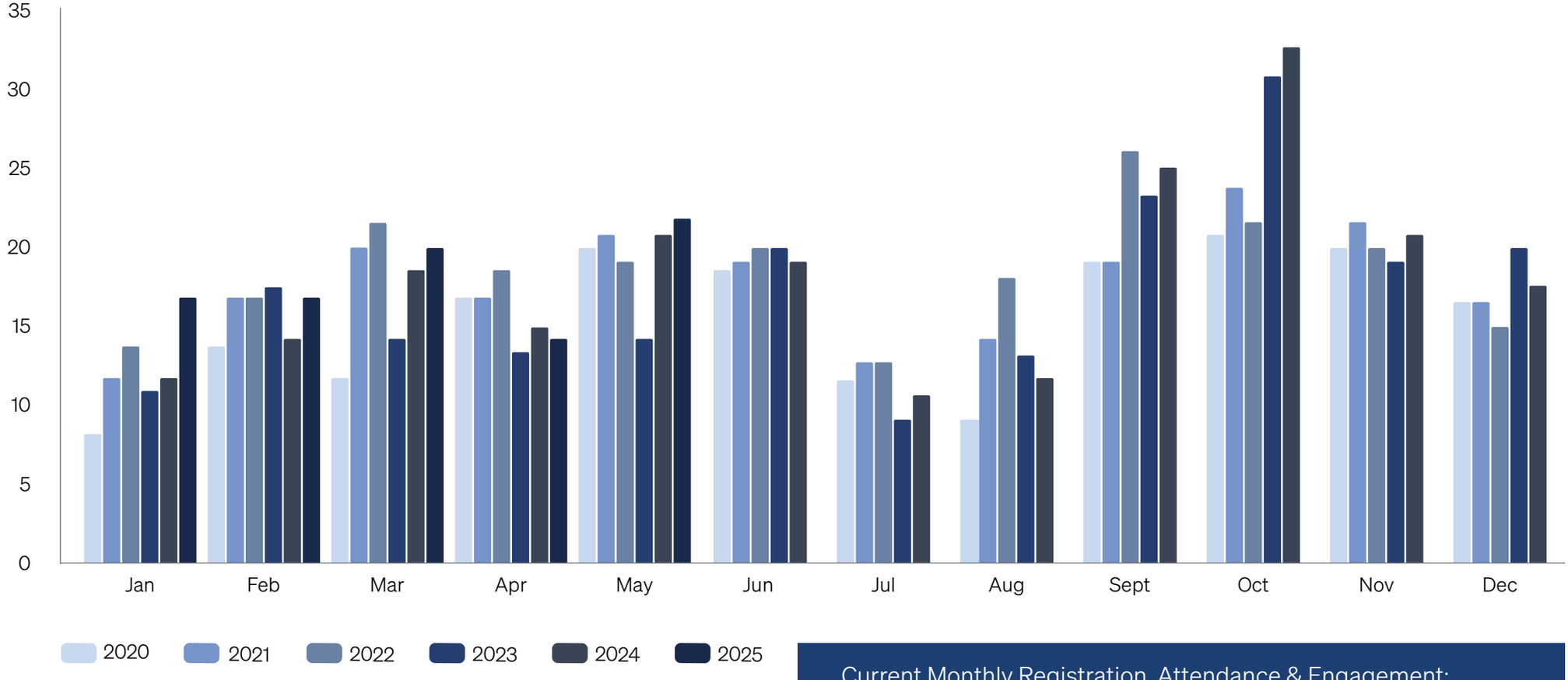
3x
The Financial Industry Benchmark Average Attendees

71%
Attendee Conversion Rate
Financial Industry and Global Webcast Benchmark (60%)

Largest Digital Cap Intro Firm In The Industry

300+ Live Events Per Year. 200,000+ Registrants Per Year. 60% Of RIA Participants Have More Than $100M in AUM.

Number of Webcasts

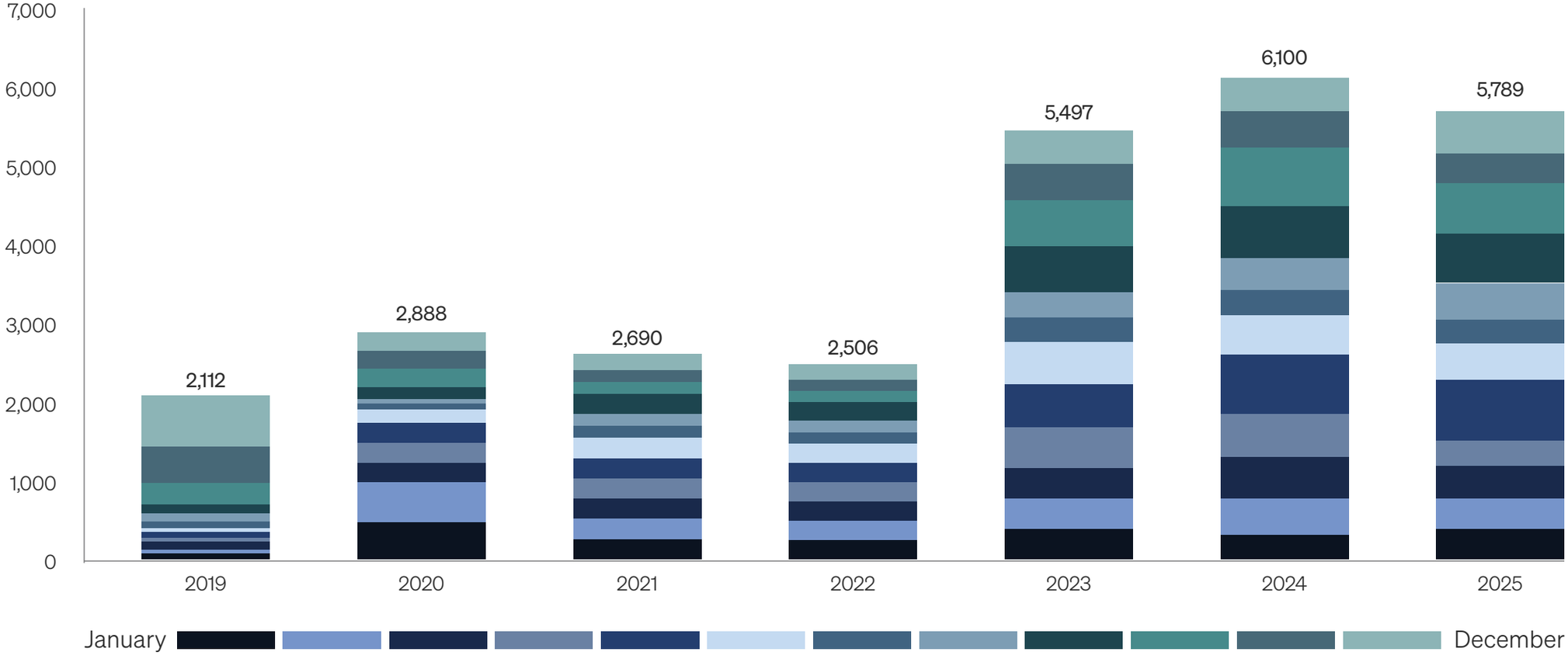


Current Monthly Registration, Attendance & Engagement:
RIAChannel.com/webcastcharts

RIA Channel® Delivers 20 To 100+ 1:1 Advisor Meeting Requests Per Event

Over 60% of RIA participants have over $100 Million in assets under management and 33% have over $1 Billion in assets under management.

One on One Meeting Requests



Current Monthly Registration, Attendance & Engagement:
RIAChannel.com/webcastcharts

Webcast Metrics

Over 60% of RIA participants have over $100 Million in assets under management and 33% have over $1 Billion in assets under management.

810
Average
Registrants

573
Average
Attendees

712
Average
Surveys Answered

600
Average
Polls Answered

38
Average
Questions Submitted

325
Average
Documents Downloaded

28
Average
Meeting Requests

2,620
Largest Registration
(Single Webcast)

1,955
Largest Attendees
(Single Webcast)

3,233
Largest Survey Questions Completed
(Single Webcast)

3,823
Largest Poll Answered
(Single Webcast)

216
Largest Questions Asked
(Single Webcast)

1,866
Largest Number of Documents Downloaded
(Single Webcast)

149
Largest Number of Meeting Requests
(Single Webcast)

384
Largest Additional Post Webcast Leads
(On Demand Single Webcast)

93
Average Additional Post Webcast Leads
(On Demand)

Webcast Deliverables

RIA Channel® has the largest advisor audience in the industry. Through RIA Database®, we maintain clean, real-time data and profiles on over one million advisors, which feeds our marketing and lead generation capabilities for all RIA Channel® events.

Full Service, White-Labeled Events

- White-labeled email blasts with sponsor branding to 450,000+ financial professionals
- Channel targeting & segmentation capabilities
- Copywriting, email creation & testing
- Event advertising on RIAChannel.com
- Custom participant survey
- “Thank you” and replay promotion emails

Technology & Execution

- Event management
- Practice session & training
- Moderating
- Editing
- CE credit exams & submission
- On Demand management

Reporting Tools & Tracking

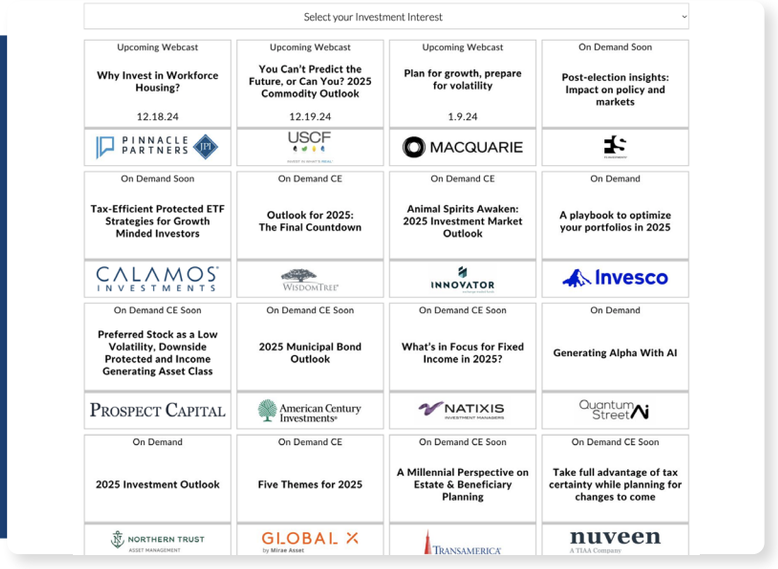
- Proprietary, interactive data dashboard
- Engagement tracking
- Full contact details
- Assets under management
- Product usage
- CRM-ready data including CRD numbers

Representative Webcast Screenshots

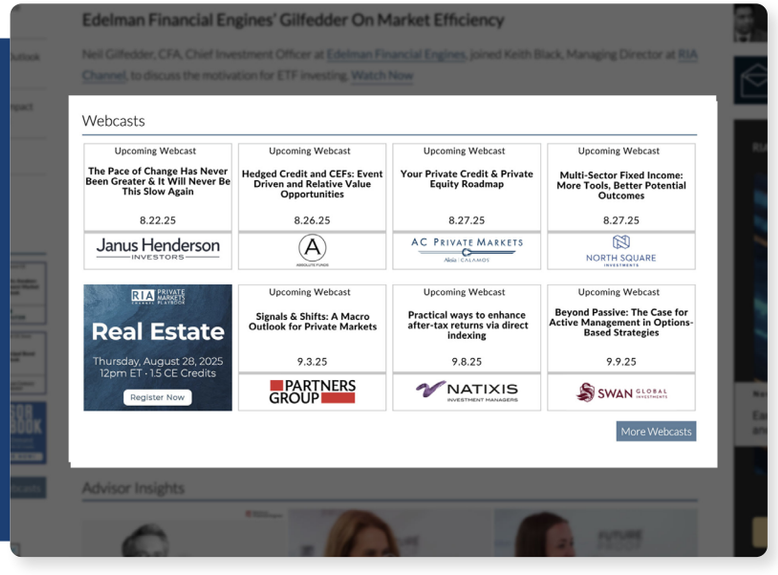
Custom Registration Page



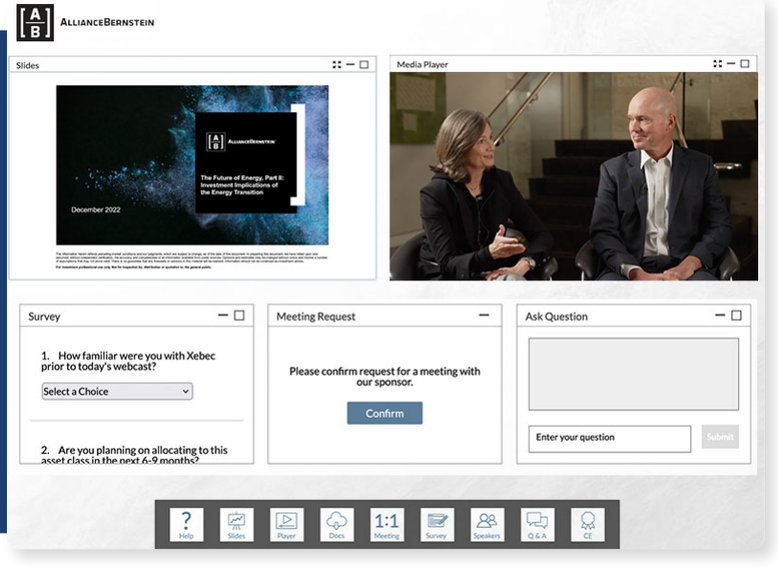
RIAChannel.com Webcast Promotion



Webcast Listing on Homepage



Webcast Console



Representative RIA Audience

AUM Breakdown of RIA Firms



More than $1B	33%
$500M - $1B	9%
$100M - $500M	19%
$50M - $100M	7%
$25M - $50M	7%
Less than $25M	25%

Notable Firms

- ASPIRIANT
- BEACON POINTE ADVISORS
- BKD WEALTH ADVISORS
- BRINKER CAPITAL
- BUCKINGHAM STRATEGIC WEALTH
- CERITY PARTNERS
- CHEVY CHASE TRUST COMPANY
- CREATIVE PLANNING
- EDELMAN
- EP WEALTH ADVISORS
- GLENMEDE
- HALBERT HARGROVE
- HIGHTOWER
- HOMRICH BERG
- IEQ CAPITAL
- MERCER
- MILLIMAN
- MISSION WEALTH MANAGEMENT
- MONETA GROUP
- OXFORD FINANCIAL GROUP
- PATHSTONE
- PLANTE MORAN
- PURE FINANCIAL ADVISORS
- ROCKEFELLER
- SAGE ADVISORY SERVICES
- SAGEPOINT
- SBSB
- SUMMIT ADVISOR SOLUTIONS
- WE FAMILY OFFICES
- WILMINGTON TRUST

PROPRIETARY DATA DASHBOARDS

Visualize Your Leads

After each webcast and/or virtual symposium, we provide access to a custom, interactive data dashboard.

Our proprietary, web-based dashboards allow you to visualize your advisor reach and determine ROI with charts, graphs, and audience engagement statistics.

RIA Database®

RIAChannel.com



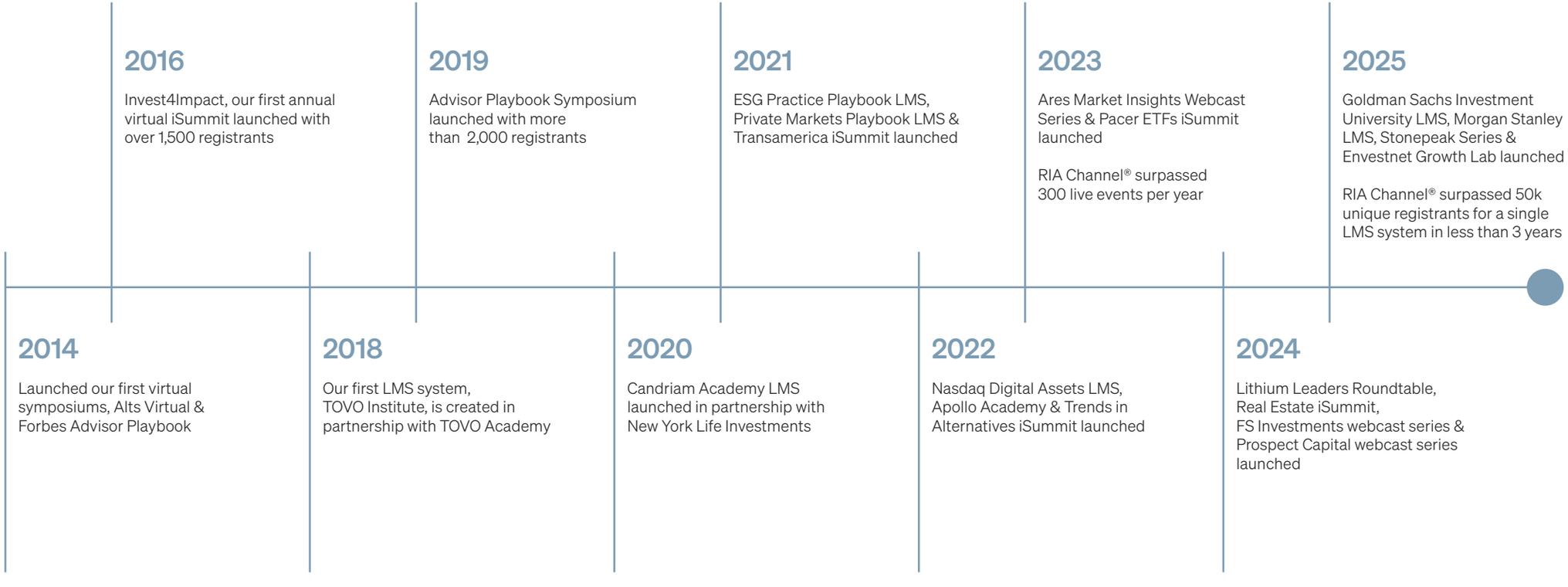
2026 Top Webcast Topics by Registrants

1. Market & Economic Outlooks
2. Private Credit
3. Precious Metals
4. Portfolio Construction
5. Geopolitics
6. Tax Optimization Strategies
7. Defined Contributions & Retirement
8. Real Estate & Infrastructure
9. Crypto, Bitcoin & Digital Assets
10. Private Markets

Experience Matters

LMS & Virtual Event Timeline

Beginning with Alts Virtual and Forbes Advisor Playbook in 2014, RIA Channel® has the longest track record and most experience as an iSummit and Learning Management System (LMS) producer in the financial services industry.



Our Creations

APOLLO ACADEMY

Goldman Sachs Investment University

Envestnet Growth Lab

ARES Wealth Management Solutions

Alternatives Investing Center
Morgan Stanley
INVESTMENT MANAGEMENT

Eaton Vance
Tax Forward Investing Center

PRIVATE MARKETS PLAYBOOK
INNOVATION. EDUCATION. ACCESS

INVEST4IMPACT

Forbes ADVISOR PLAYBOOK

Trends in Alternatives
An Advisor's Perspective

OPPORTUNITY ZONES iSUMMIT

PACER ETFs
Investment Insights Summit

GLOBAL X
by Mirae Asset

Lithium Leaders:
A CEO Roundtable on Market Trends and the Future of the Industry

GITTERMAN ASSET MANAGEMENT
ESG PLAYBOOK
iSUMMIT

CANDRIAM ACADEMY

ADVISOR PLAYBOOK
produced by RIA Channel

Nasdaq SMART BETA SYMPOSIUM

ALTs & INCOME VIRTUAL SUMMIT

RIA Channel® | Digital Assets

TRANSAMERICA®
Investment Insights Summit

MARKET OUTLOOK iSUMMIT

ETF VIRTUAL SUMMIT

2026-2027 RIA Channel® Symposium

Designed exclusively for financial advisors, RIA Channel® virtual events and courses showcase your expertise, research and product offerings to the widest advisor audience available. Advisors gain access to investment managers, continuing education credits and interactive sessions for questions and feedback.

Now Available On Demand

MidYear Outlook iSummit

RIAChannel.com/midyearoutlook

Now Available On Demand

Opportunity Zones 2.0 iSummit

RIAChannel.com/oz2

Now Available On Demand

Private Markets Playbook – Private Credit

Privatemarketsplaybook.com

Monday, December 14, 2026

The ETF iSummit

RIAChannel.com/etf

Friday, December 18, 2026

Advisor Playbook

RIAChannel.com/playbook

Friday, February 19, 2027

Private Markets Playbook - Private Equity

Privatemarketsplaybook.com

Friday, March 19, 2027

Private Markets Playbook - Real Estate

Privatemarketsplaybook.com

Friday, April 16, 2027

Private Markets Playbook - Portfolio Construction

Privatemarketsplaybook.com

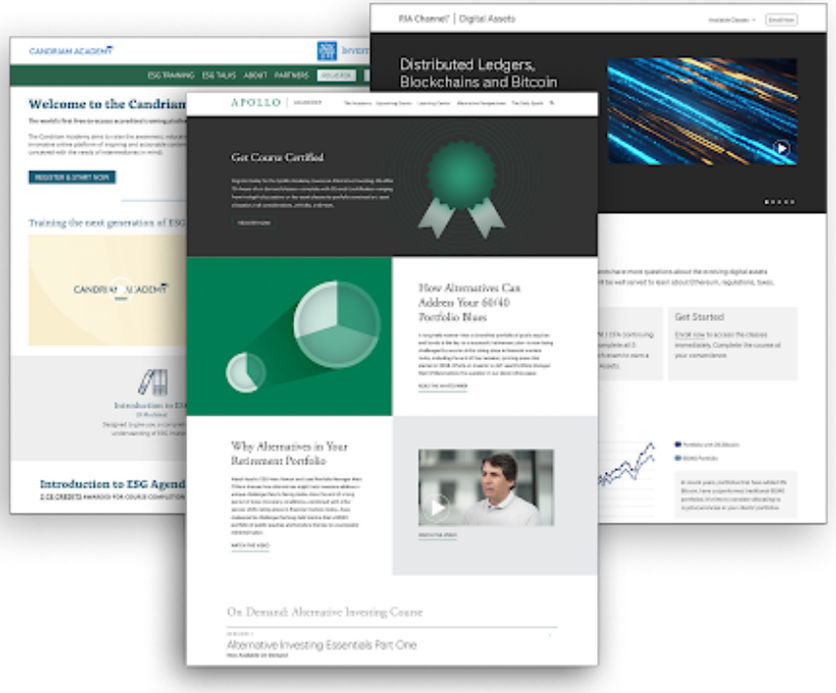
Monday, July 12, 2027

MidYear Outlook iSummit

RIAChannel.com/midyearoutlook

Custom Learning Management Systems (LMS)

Learning management systems provide a unique opportunity to reach a large audience with brand-specific educational materials, unlocking an engaged list of leads. RIA Channel® manages course development and content creation with professor-led, unbiased educational programming. We develop, build and secure the custom site and manage the server hosting. Our premium LMS technology provides detailed user tracking, centralized data and custom reporting tools.



Educational Platforms

2,300 - 55,000
Registrants

1,500 - 71,500
Monthly Site Visits

Apollo Academy (ApolloAcademy.com)

The Apollo Academy has delivered alternative investment education to thousands of financial professionals since its launch in 2022. The course and monthly classes offer investment intelligence from key experts at Apollo, along with fresh content through white papers, articles, podcasts, the Daily Spark blog, and more.

Goldman Sachs Investment University (GSInvestmentUniversity.com)

Goldman Sachs Investment University, since its launch in 2025, has provided alternative investment education spanning public and private markets to thousands of financial professionals globally. The platform features live and on-demand courses led by Goldman Sachs experts, complemented by timely insights through white papers, articles, videos, and more.

Candriam Academy (RIAChannel.com/Candriam)

The Candriam Academy, since its launch in 2020, has aimed to raise the awareness, education and knowledge of financial intermediaries on the topic of sustainable investing via innovative course modules and ESG Talks video discussions. The course provides access to the tools needed to get better acquainted with the basics of ESG investing, enabling advisors to have more thoughtful client conversations on the topic, while also attaining CE credit.

RIA CHANNEL®

Introducing the ENGAGE Platform

Own your audience.
Own your data.
Own your growth.

A custom-branded, first-party lead engagement platform designed exclusively for asset managers.
Turn qualified visitors into real-time, trackable leads.

ENGAGE

RIA Channel's ENGAGE websites create custom-branded, first-party lead engagement platforms designed exclusively for asset managers. Engage sites turn qualified visitors into real-time, trackable leads.

Brand & Experience

- Full brand control — your logo, colors, and messaging
- Tailored experience designed for your audience
- A content and event hub for the intermediary channel

Live Events & Lead Capture

- Drive registration with live events
- Site login for tracking user consent
- One-click registration boosts On Demand registration

Tracking & Attribution

- Customer journey capabilities
- Customizable content cohort tracking
- True first-party intent data generation

Real-Time Reporting

- Live site activity by financial professional
- High value prospect engagement alerts
- Track campaign performance and conversion over time

Actionable Data & Insights

- Aggregated activity across events by user in a single profile
- Leads enriched with CRD, AUM, 13F data and more
- Easily identify top RIAs, decision makers and producers

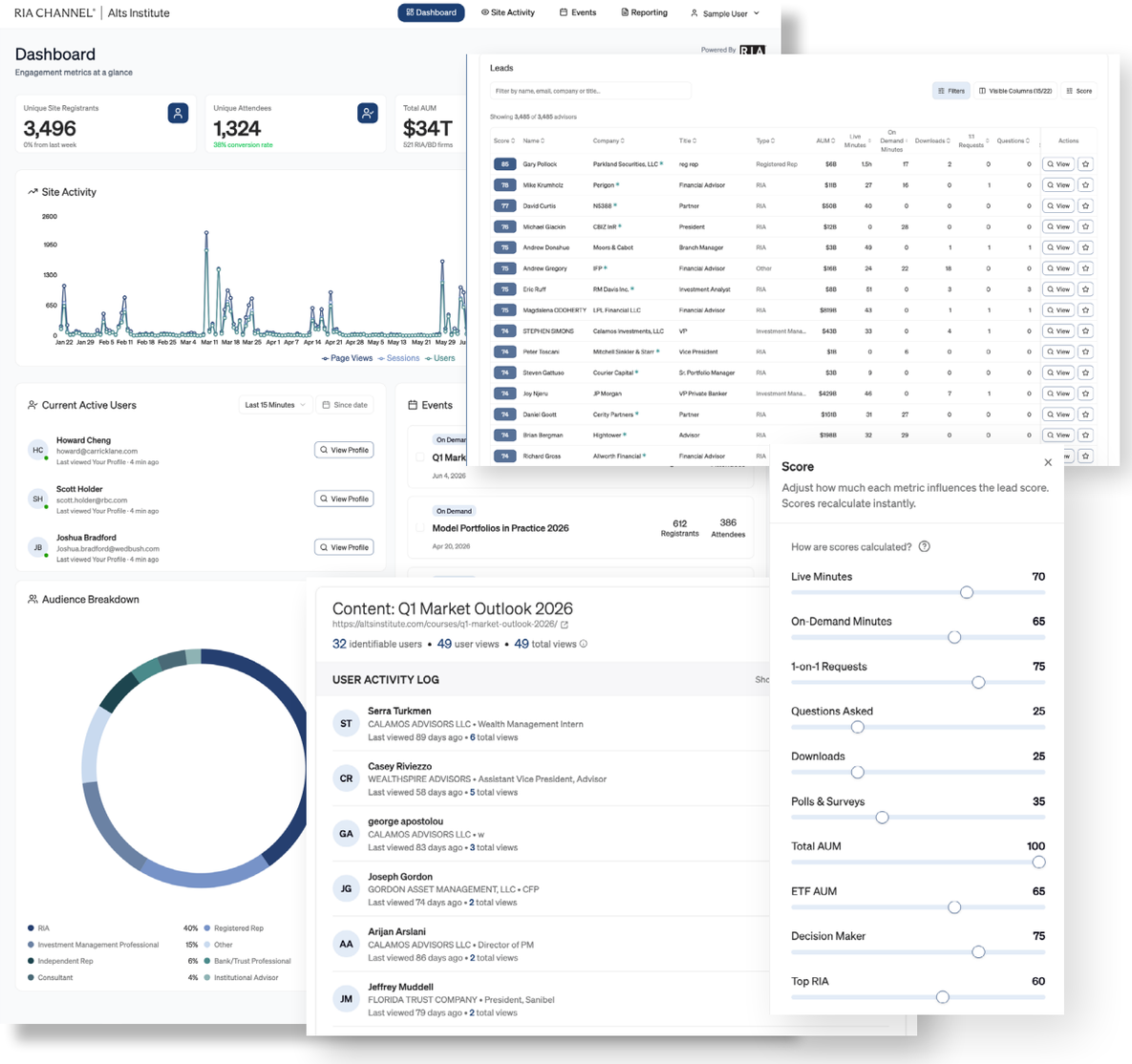
Dynamic Lead Scoring

- Score and rank leads on your terms
- Rank by activity, event participation, or firm quality
- Empower sales professionals with actionable leads

ENGAGE - How It Works

RIA Channel's ENGAGE websites create custom-branded, first-party lead engagement platforms designed exclusively for asset managers. Engage sites turn qualified visitors into real-time, trackable leads.

1. Custom Site
2. Register & Consent
3. Live Events
4. Intent Capture
5. Data Matching
6. Engage Dashboard

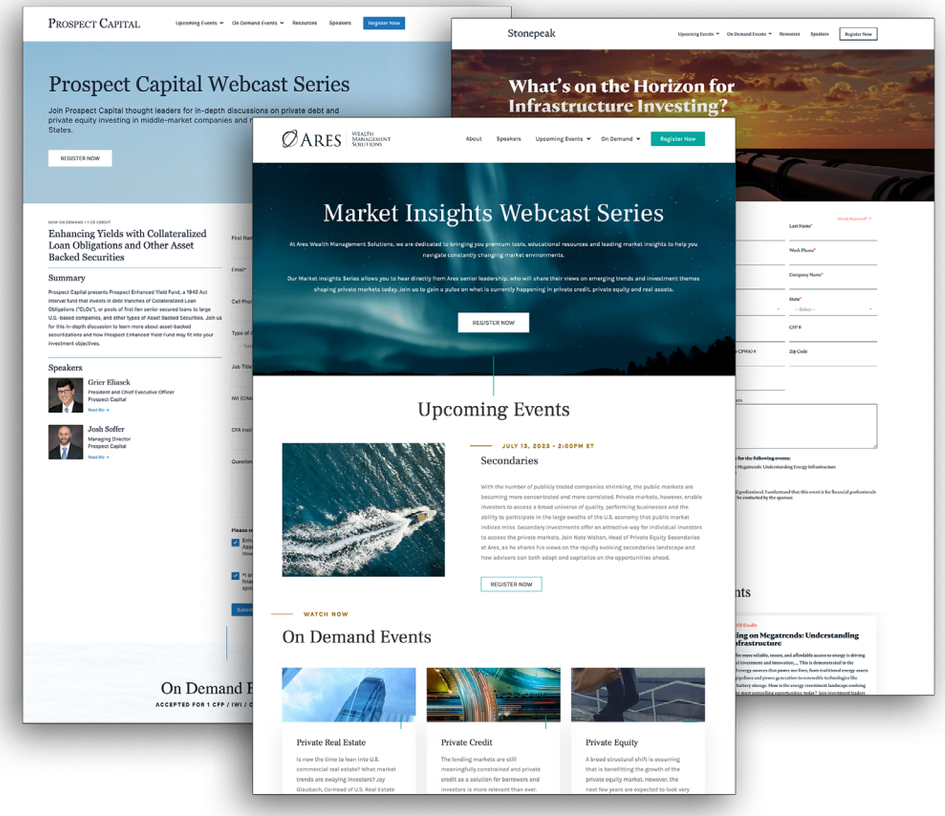


Managed Platforms

FEATURES	Microsite	ENGAGE	LMS
BRAND & EXPERIENCE			
Custom site branding	✓	✓	✓
Event and content hub for the intermediary channel	✓	✓	✓
One-click site and event registration	-	✓	✓
DATA & REPORTING			
Site login for tracking user consent	-	✓	✓
First-party intent data generation	-	✓	✓
User journey and attribution analytics	-	✓	✓
Real-time dashboard with lead scoring and data enrichment	-	✓	✓
CONTENT & BUILD SERVICES			
Custom, professor-led curriculum, course creation and content development	-	-	✓
Custom, white-labeled LMS software	-	-	✓
Course progress tracking and exam execution	-	-	✓
Dedicated project manager and support team	-	-	✓

White-Labeled Custom Event Series

A custom, white-labeled webcast series organizes webcasts into a beautifully designed website, providing a simple solution for promotion and lead generation of multiple topics and events. RIA Channel® develops, builds and secures the custom site on RIAChannel.com. We utilize premium webcast technology with both registrant and engagement tracking. Lead data is provided via our proprietary, interactive data dashboard. Each custom branded microsite provides access to registration for upcoming and past events. Unique pages are added to the site for each individual webcast, providing more detailed information and a lead capturing registration form.



Prospect Capital Webcast Series (RIAChannel.com/prospect-capital)

The Prospect Capital Webcast Series provides in-depth discussions on private debt and private equity investing in middle-market companies and real estate in the United States.

Ares Market Insights Webcast Series (RIAChannel.com/ares)

The Ares Market Insights Webcast Series allows advisors to hear directly from Ares senior leadership, who share their views on emerging trends and investment themes shaping private markets today.

Stonepeak Webcast Series (RIAChannel.com/stonepeak)

The Stonepeak Webcast Series provides the latest trends and insights as the world's largest independent infrastructure specialist.

Series Annual Averages

7,000+
Total Registrants

70%
Unique Registrants Per Event

White-Labeled Virtual Events

Custom, white-labeled virtual events offer high impact results within a multi-hour webcast. RIA Channel® develops, builds and secures the custom site on RIAChannel.com. We utilize premium webcast technology with registrant and engagement tracking. RIA Channel® manages the organization, pre-recording of sessions and management of the live event. Lead data is provided via our proprietary, interactive data dashboard.



Pacer ETFs Investment Insights Summit (RIAChannel.com/pacer)

This online event showcases six, 30-minute sessions featuring expert insights from Pacer ETFs' investment thought leaders and portfolio managers.

Global X Lithium Leaders Roundtable (RIAChannel.com/globalx)

This online event offers four, 30-minute sessions showcasing Global X's investment thought leaders and CEOs on market trends and the future of the Lithium industry.

Innovator ETFs Summit (RIAChannel.com/innovator)

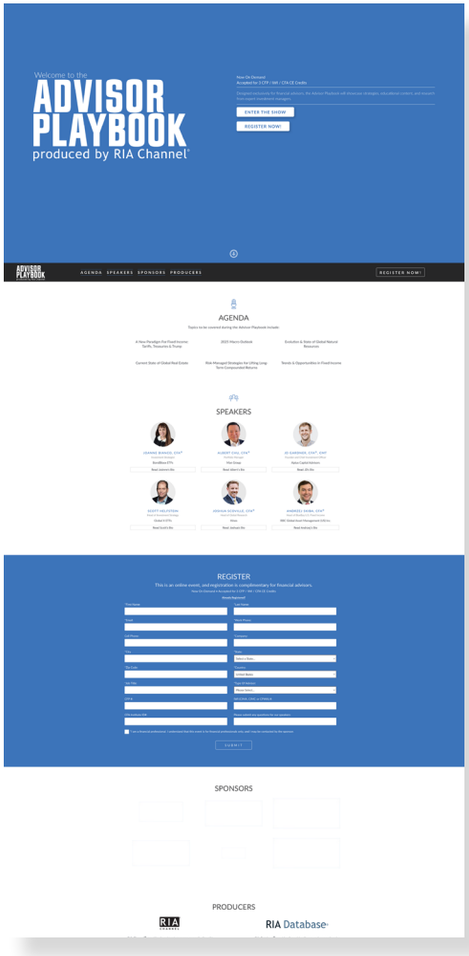
This online event provides five, 30-minute sessions from Innovator ETFs' investment thought leaders and partner practitioners. These interactive, educational sessions offer CE credits and are complimentary for financial professionals.

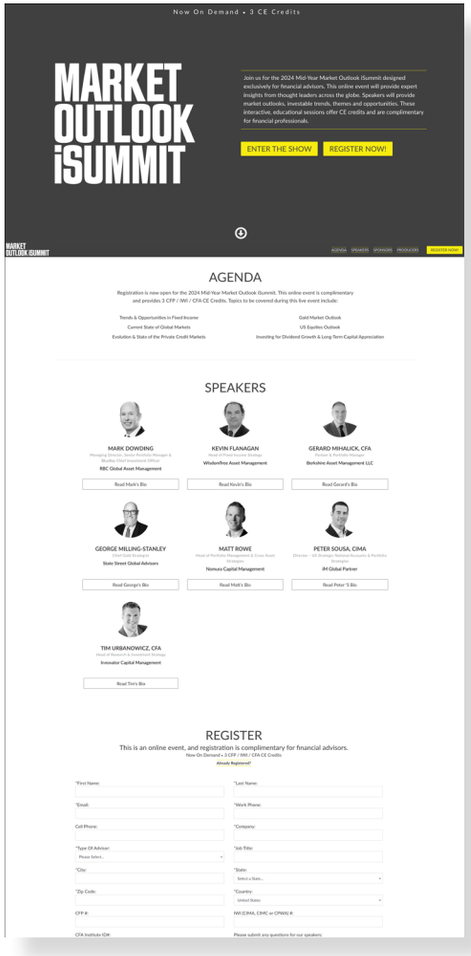
Event Averages

1,290	940	70+
Registrants	**Attendance**	**Meeting Requests**

Virtual iSummits and Symposiums

Virtual iSummits and Symposiums offer high impact results within a multi-hour webcast. RIA Channel® develops, builds and secures the custom site on RIAChannel.com. We utilize premium webcast technology with registrant and engagement tracking. RIA Channel® manages the organization, pre-recording of sessions and management of the live event. Lead data is provided via our proprietary, interactive data dashboard.





Advisor Playbook (RIAChannel.com/playbook)

Designed exclusively for financial advisors, the Advisor Playbook will showcase strategies, educational content, and research from expert investment managers.

Market Outlook iSummit (RIAChannel.com/midyearoutlook)

This online event provides expert insights from thought leaders across the globe. Speakers provide market outlooks, investable trends, themes and opportunities.

Half-Day Event Highlights

2,633
Highest Single Event Registration

1,675
Highest Single Event Live Attendance

Custom Email Marketing

Distribute your firm's video, research, thought leadership, new product launches, product updates, and other content to our audience of 450,000+ opt-in financial professionals.

We Provide

- **Email Distribution:**

  Access RIAs, wirehouse reps, independent reps, bank and trust professionals, family offices, and institutional investors.

- **Lead Targeting:**

  Segment and target your ideal prospects by geography, firm size, channel, or product interest.

- **Lead Generation:**

  RIA Channel® provides complete details on all advisor clicks including full contact information, AUM, licenses, CRD numbers, clearing firms, and product usage.

- **Email Marketing Compliance:**

  RIA Channel® follows and manages complete CAN-SPAM, GDPR and CCPA procedures and compliance.

Custom Email Marketing (cont.)

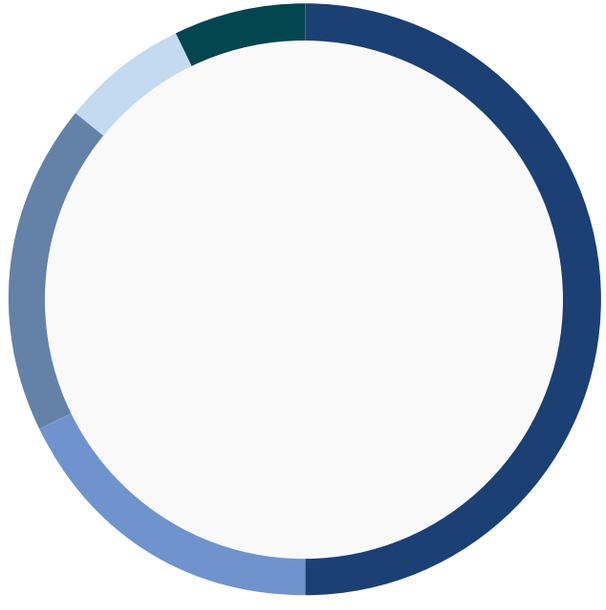
EMAIL CAMPAIGN AVERAGES

450,000+
Financial Professionals

8-10%
Open Rate

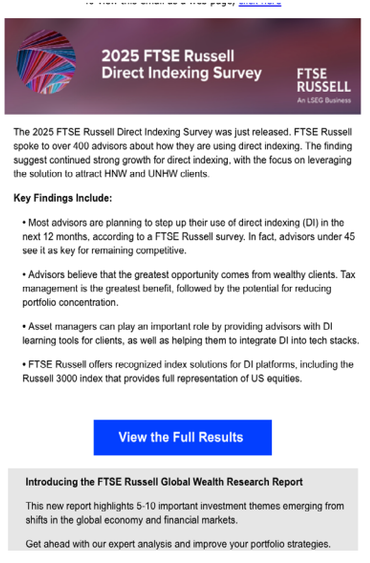
7-12%
Click Through Rate

AUDIENCE BREAKDOWN

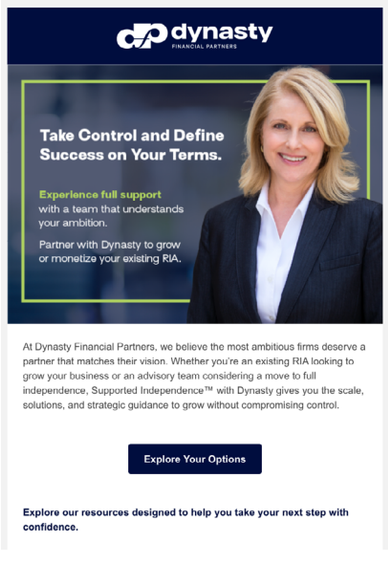


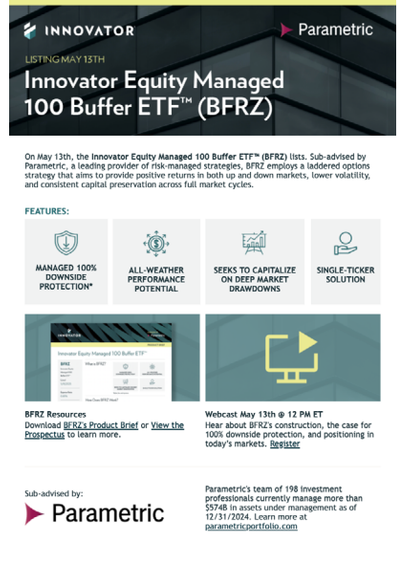
RIAs	50%
Wirehouse Reps	18%
Independent Reps	18%
Institutional Investors	7%
Family Office, Bank/Trust and Other Advisors	7%

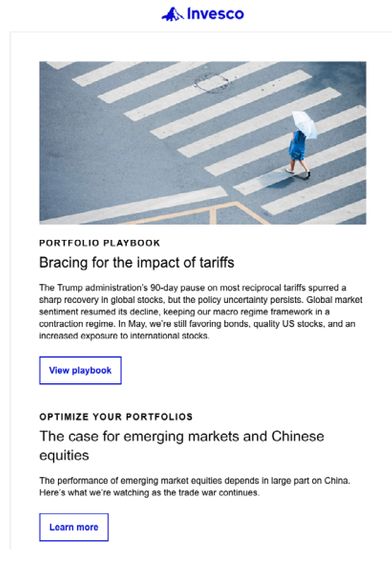
Representative Email And Video Blasts

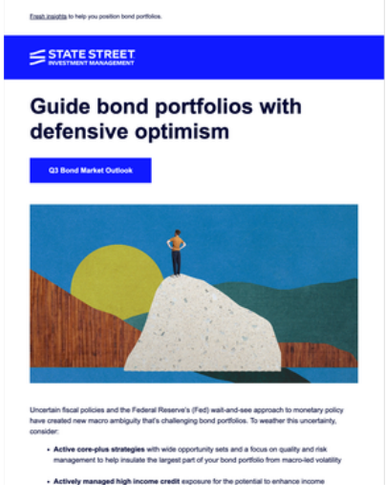




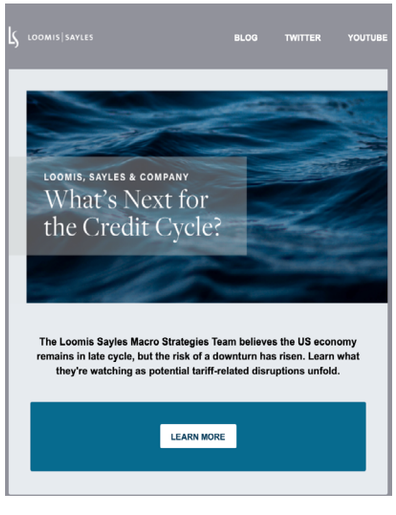




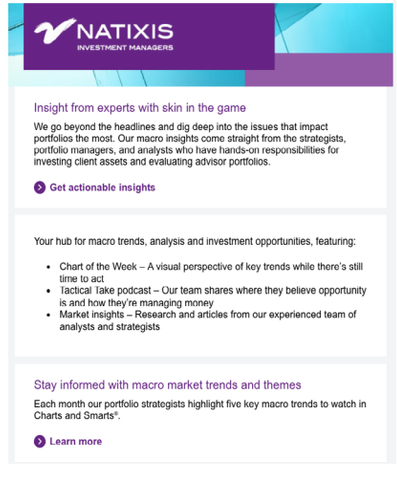












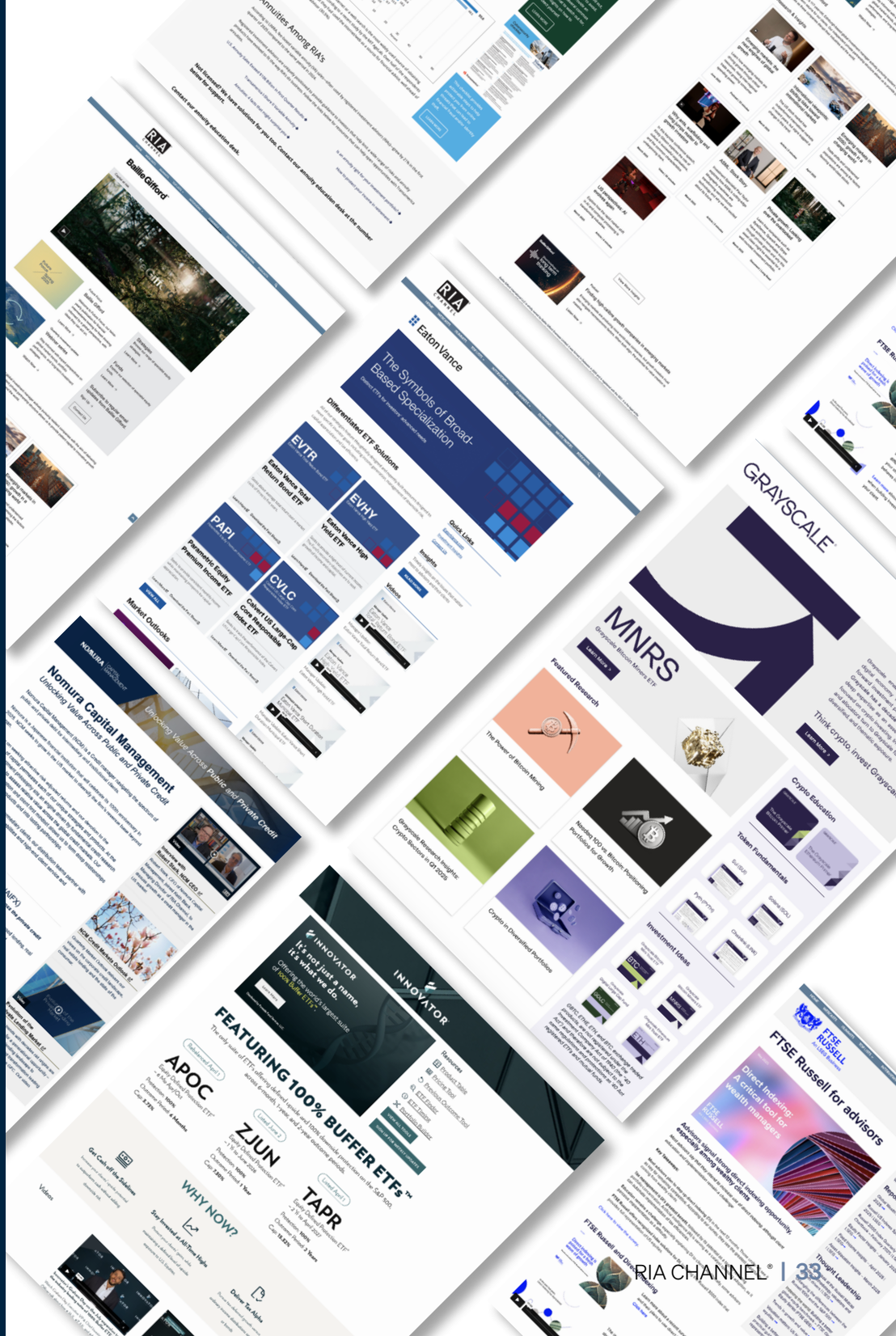
Manager Channels within RIAChannel.com

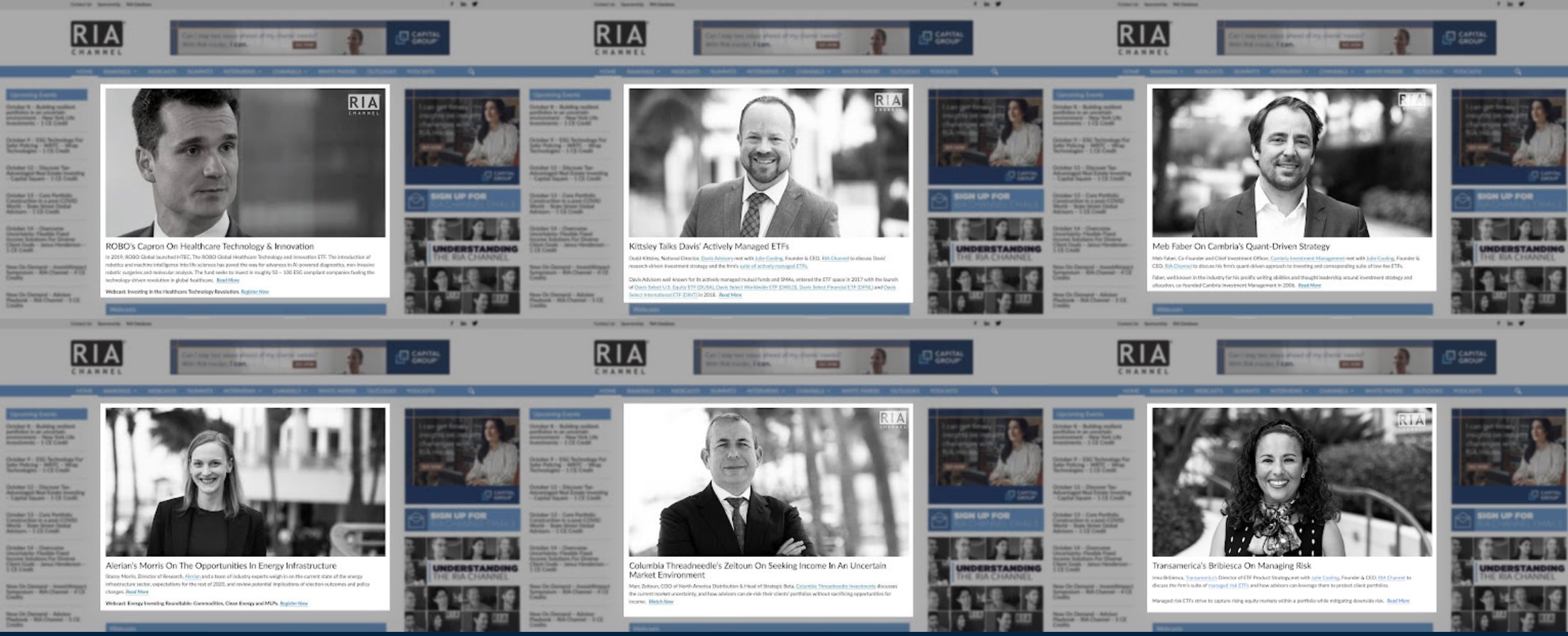
RIA Channel® drives advisor traffic to your private-labeled microsite via email blasts, newsletters, cross-marketing opportunities, and other events.

- Your firm will have a logo tile on the RIAChannel.com homepage linking to your proprietary microsite.
- Your microsite will be managed by RIA Channel® with all content provided by your firm.

Content may include:

- Videos
- Webcasts
- White papers
- Research papers
- Product sheets
- Website links
- Podcasts
- Blogs
- News & Twitter posts
- Salesperson contact information





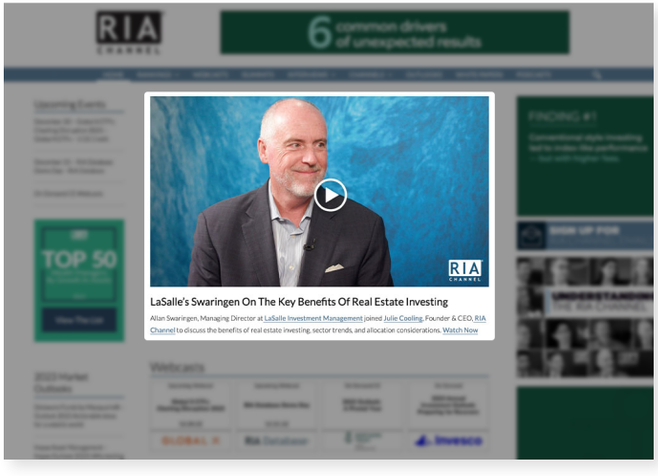
Manager Spotlights

RIA Channel® will write and promote an article on key market insights, outlook, strategies or current events relevant to your investment approach. The article and featured image will be promoted on RIAChannel.com's home page and social media channels.

Video Interviews

RIA Channel® regularly produces and distributes short video interviews with top industry leaders.

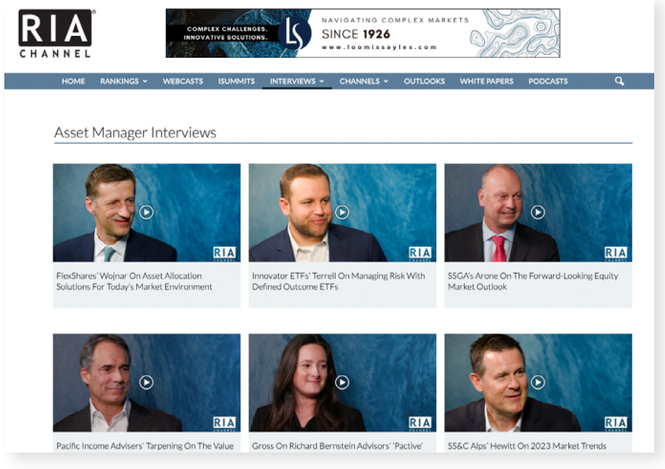
- Production and editing of video interview included.
- Videos are posted on RIAChannel.com, LinkedIn, and the sponsor's websites.
- Video Blasts can be sent to our email distribution audience of 450,000+ opt-in financial professionals.



Video Placement on Homepage



Representative Video Article



RIA Channel® Video Page

RIA Channel® eNewsletter Sponsorships

RIA Channel® eNewsletters contain videos, webcast promotions, news, white papers and investment research. They are distributed weekly to our audience of 450,000+ financial professionals. The average open rate of the eNewsletter is 8-10%.

Leaderboard: 728px x 90px

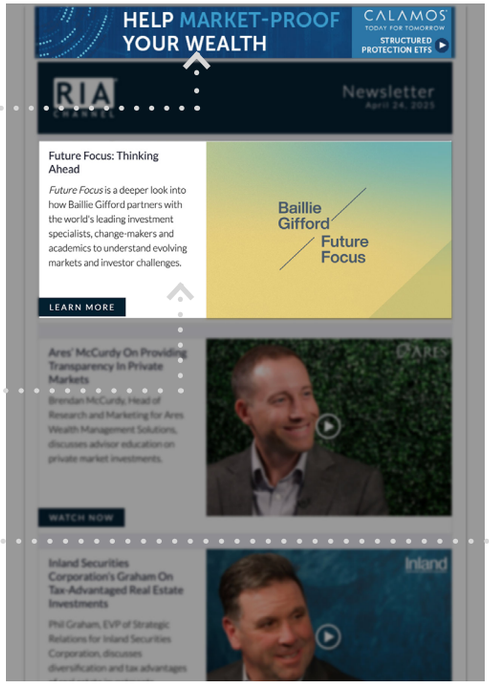
The Leaderboard ad runs across the top of the RIA Channel® newsletter

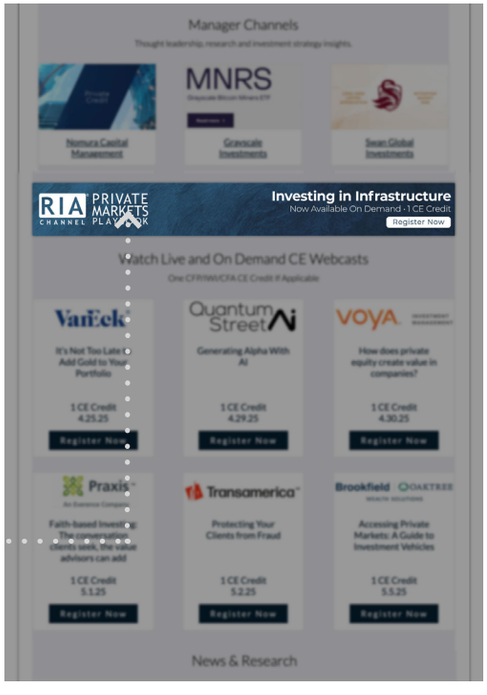
Sponsor Content / Video: 710px x 514px

A title, short description, image and call to action for content or a video interview.

Mid-Tier: 728px x 90px

The Mid-Tier ad is placed within the middle of the newsletter.





eNEWSLETTER AVERAGES

450,000+	30,000+	300+
Financial Professionals	Opens	Ad Clicks

Leads can be provided from the distribution for an additional fee.

RIA Channel® Upcoming Events Send Sponsorships

The RIA Channel® upcoming events send contains a list of upcoming and on demand events. It is distributed weekly to our audience of 450,000+ financial professionals. The average open rate of the upcoming events send is 8-10%.

Leaderboard: 728px x 90px

The Leaderboard ad runs across the top of the RIA Channel® Upcoming Events Send

Bottom Tier: 728px x 90px

The Bottom Tier ad runs across the bottom of the RIA Channel® Upcoming Events Send

Contact us for additional information about listing your own event in one of these sends. Leads can be provided from the distribution for an additional fee.

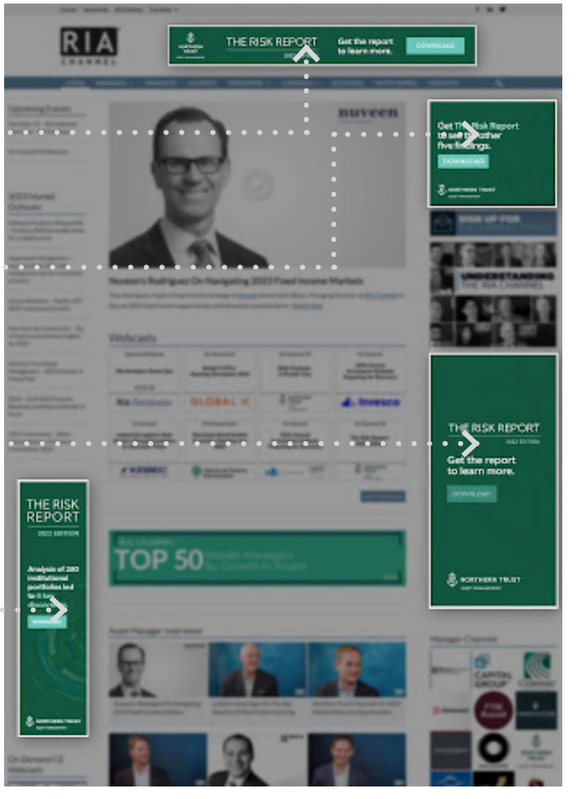


Upcoming Events Send Averages

450,000+	30,000+	200+
Financial Professionals	**Opens**	**Ad Clicks**

Advertising on RIAChannel.com

With an average of 5,000 targeted impressions per day, RIAChannel.com provides an excellent opportunity to deliver your brand's digital advertisements.



Leaderboard: 728px x 90px

The Leaderboard ad runs across the top of most pages on RIAChannel.com.

Medium Rectangle: 300px x 250px

The Medium Rectangle ad is positioned above the fold within the right sidebar of most pages on RIAChannel.com.

Half Page: 300px x 600px

The Half Page ad is positioned across the fold within the right sidebar of most pages on RIAChannel.com.

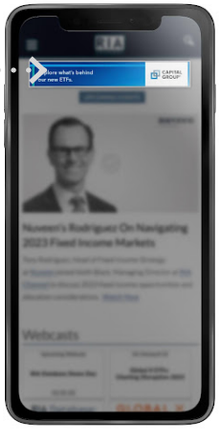
Skyscraper: 160px x 600px

The Wide Skyscraper ad is positioned below the fold within the left sidebar of RIAChannel.com's homepage.

Billboard: 970px x 250px

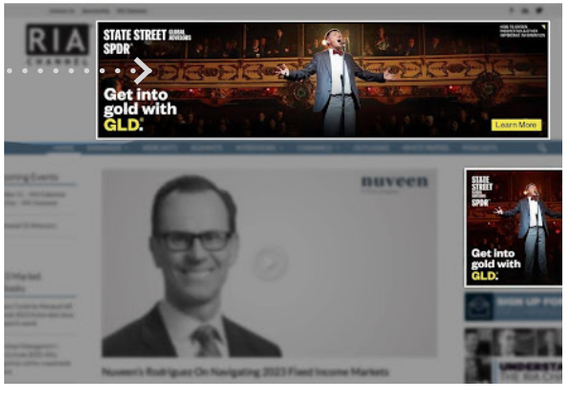
The Billboard ad can be used to replace the Leaderboard ad about the main navigation on RIAChannel.com.

It can also be used below the content, in the main body of some pages (i.e. Top List pages).



Mobile Leaderboard: 320px x 50px

The Mobile Leaderboard ad replaces the standard Leaderboard ad on RIAChannel.com when viewed on mobile devices.



Digital Ad Specs

Creative Name	Creative Size	Image File Size	HTML5 File Size	Polite File Size (Additional Loads)	Animation Time	Looping
Leaderboard	728px x 90px	45 KB	200 KB	75 KB	30 Seconds	3 Loops Max
Medium Rectangle	300px x 250px	45 KB	200 KB	75 KB	30 Seconds	3 Loops Max
Half Page	300px x 600px	45 KB	200 KB	75 KB	30 Seconds	3 Loops Max
Skyscraper	160px x 600px	45 KB	200 KB	75 KB	30 Seconds	3 Loops Max
Mobile Leaderboard	320px x 50px	45 KB	50 KB	25 KB	15 Seconds	3 Loops Max
Billboard	970px x 250px	45 KB	200 KB	300 KB	30 Seconds	3 Loops Max

ACCEPTED FILE TYPES:

.jpg, .png, .gif, Rich Media, 3rd Party tag/HTML5*

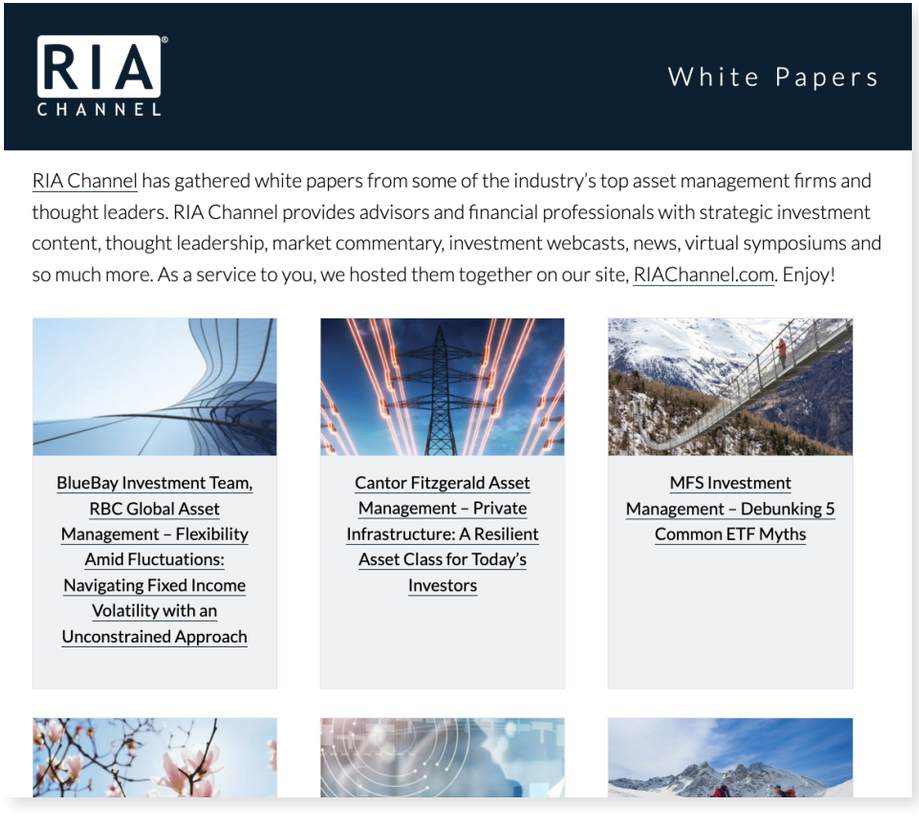
- All rich media and HTML5 tags must be 3rd-party hosted
- Ads and all features of the ad must be served using a secured URL (https)
- .jpg, .png, & .gif ads automatically offers an option to close the ad when serving through Google Ad Manager

DEADLINES:

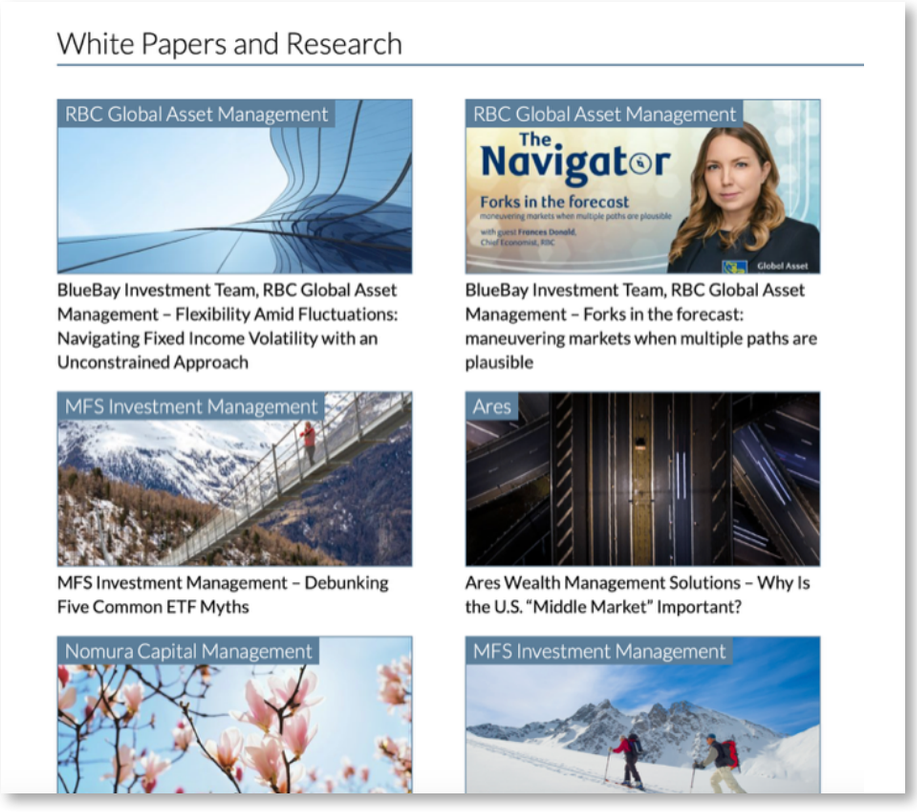
- 5 Business Days (prior to launch): Tags and/or creative must be delivered to RIA Channel®.
- 3 Business Days (prior to launch): RIA Channel® provides preview links of each creative for approval.
- 1 Business Day (prior to launch): Approval of preview links must be returned to RIA Channel®.

White Paper Sponsorship

Inclusion in one monthly white paper promotion to full list of 450,000+ financial professionals. RIA Channel® will host, promote and provide lead data on your white papers and/or research.



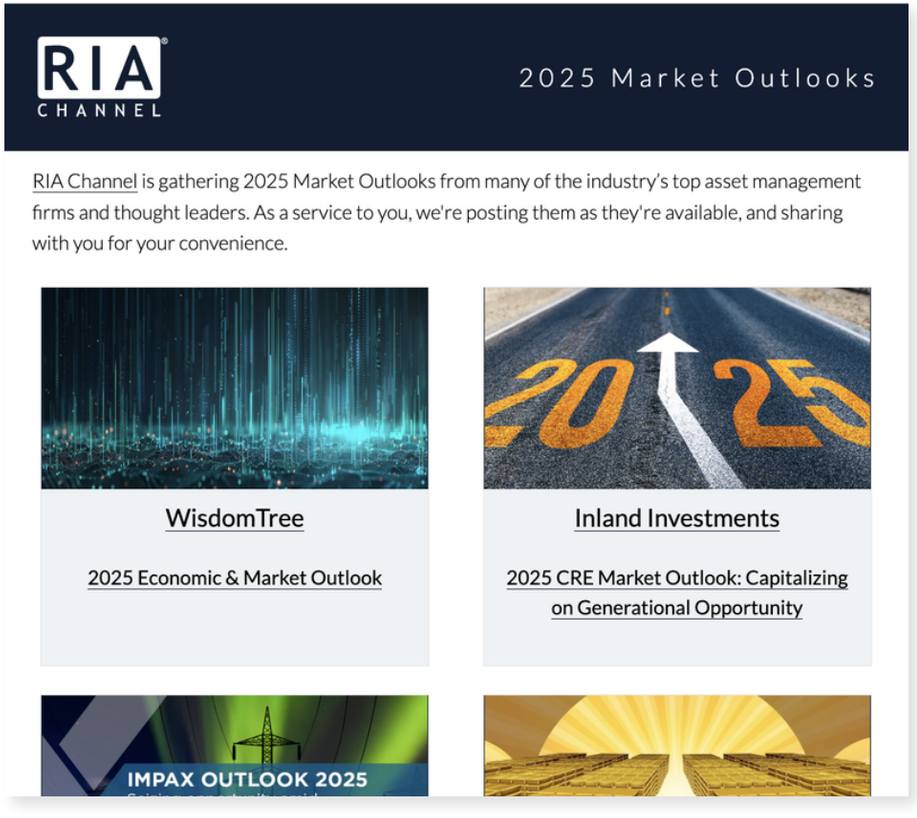
White Paper Promotional Email



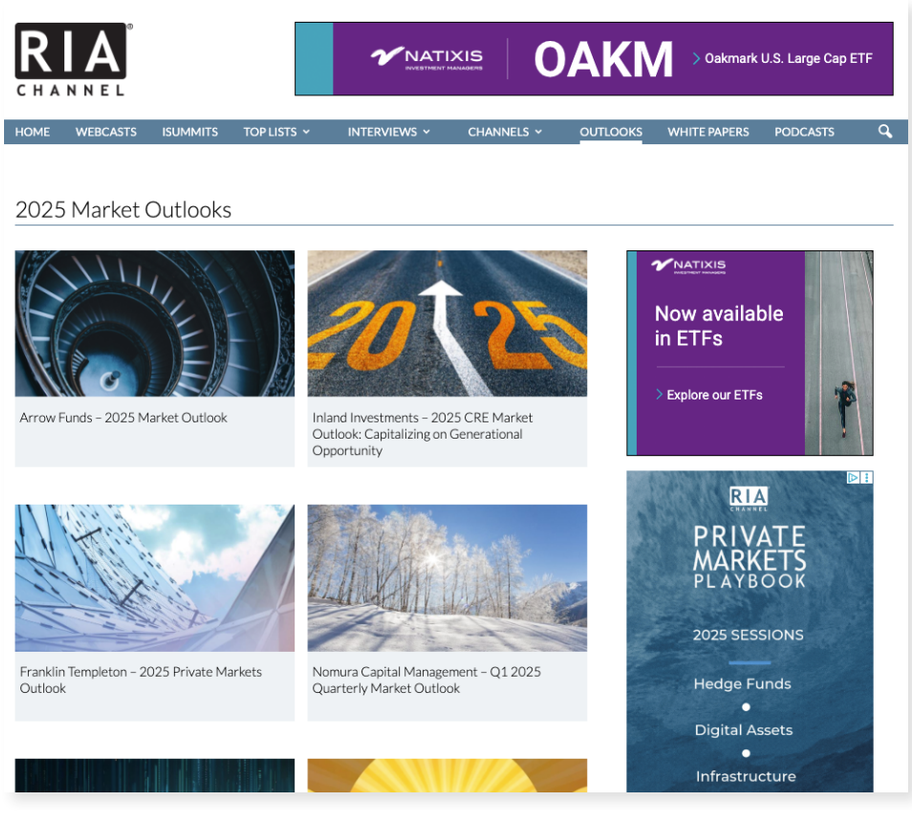
White Paper Website Page

Market Outlook Sponsorship

From December to February your branding will be in all promotional marketing to our full list of 450,000+ financial professionals. RIA Channel® will host, promote and provide lead data on your market outlook.



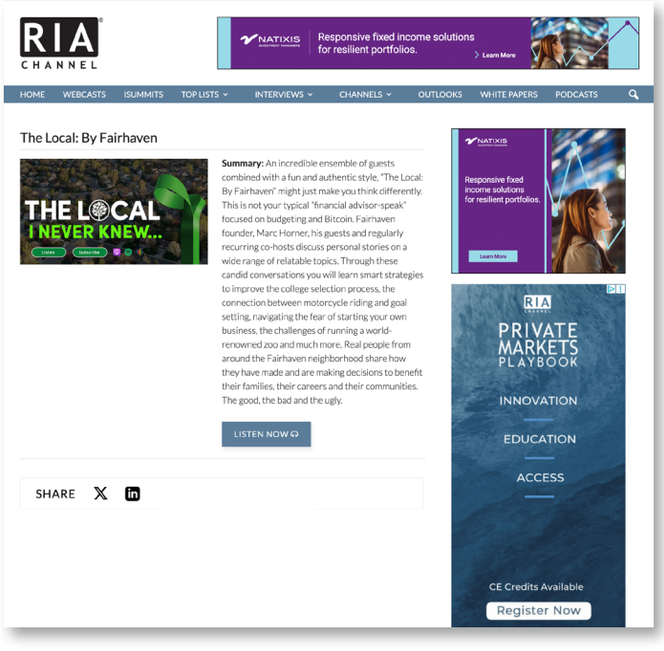
Market Outlook Promotional Email

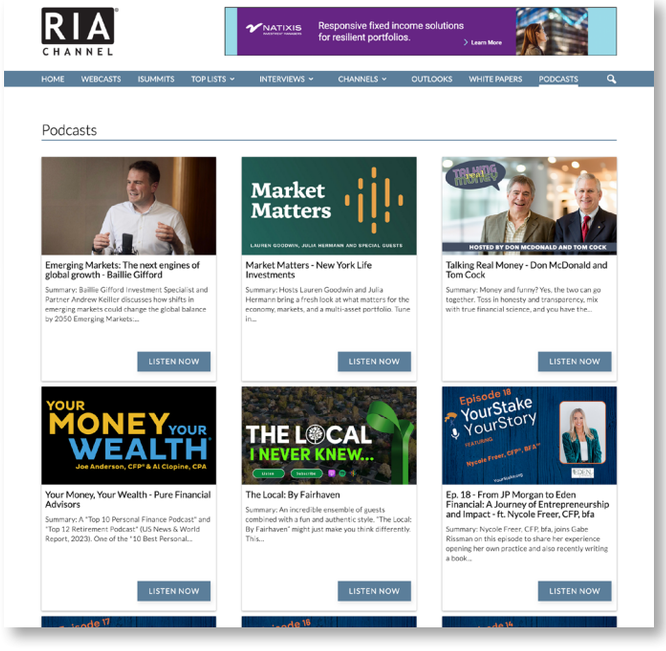


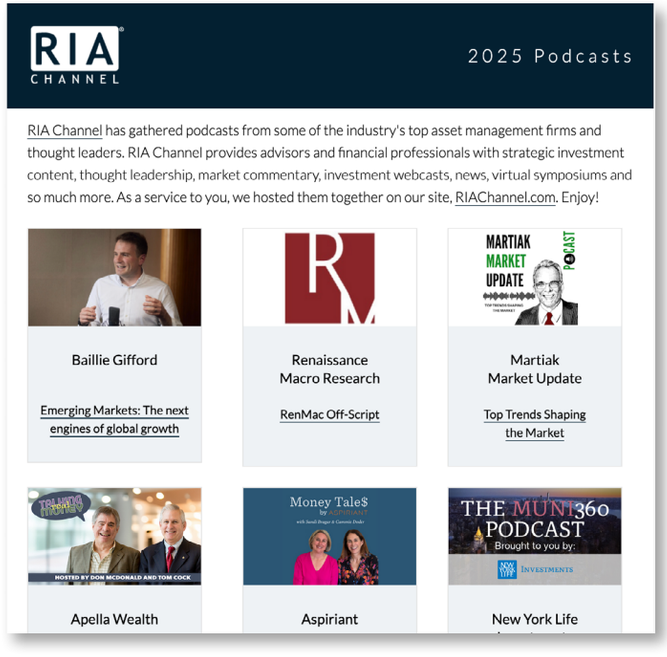
Market Outlook Website Page

Podcast Sponsorship

RIA Channel® promotes episodes of your podcast that are already live. Podcasts will be included in one monthly promotion to our full list of 450,000+ financial professionals.







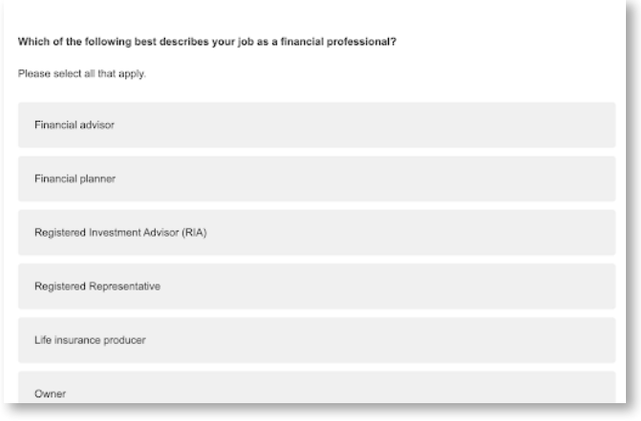
Representative Podcast Post

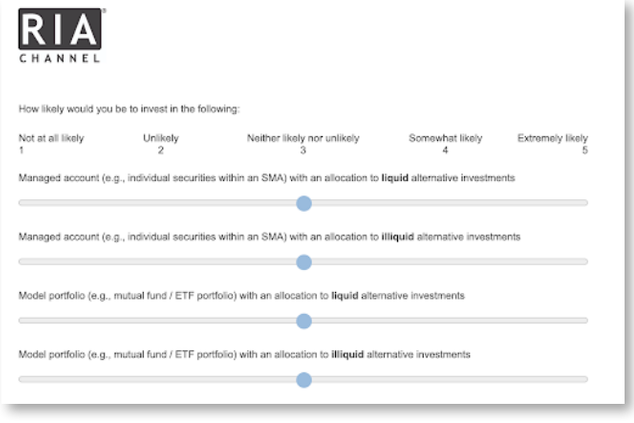
Podcasts on RIAChannel.com

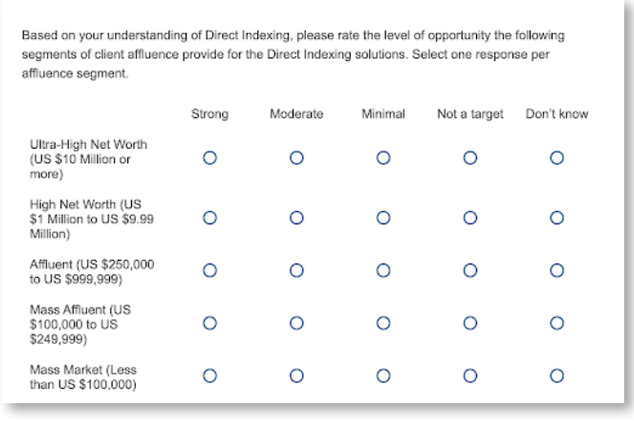
Podcast Promotional Email

Custom Surveys

RIA Channel® creates custom surveys measuring awareness and perception of brands and investment themes. It is distributed to our audience of 450,000+ financial professionals. RIA Channel® will facilitate a giveaway associated with completing the survey. High level stats on each question and response will be provided.







SURVEY AVERAGES

450,000+
Financial Professionals

10-15
Survey Questions

2-4
Weeks in the Field

500+
Survey Responses

RIA Database®

The Industry Leader in Advisor Data, Organic Research, Surveys, Analysis, RIA Trends and Top Lists

RIA Database®

- All RIA Firms
- All RIA IARs
- 430,000+ Advisors
- 40,000+ Firms
- 200+ searchable fields

Registered Rep Database

- All Wirehouse reps
- All Independent reps
- All FINRA reps
- 500,000+ advisors
- 25+ searchable fields

Family Office Database

- 1,000+ single family offices
- 800+ multi-family offices
- 2,000+ family foundations
- 750+ consultants
- 15+ searchable fields

Bank / Trust Database

- All FDIC banks
- All Trust companies
- 25,000+ key contacts
- 8,600+ firms
- 15+ searchable fields

Data. Access. Insight.

RIA Database® provides comprehensive data, software, analytics and marketing services to the financial services industry. Our proprietary, web-based software allows you to sort, search, save and download targeted leads for your sales and marketing efforts.

RIA Database®

Easily Identify

- Wealth Managers
- Fee-based Advisors
- Family Offices
- Hybrid Advisors
- Wirehouse Reps
- RIA Aggregators
- Bank Reps
- Trust Companies
- Asset Managers
- ETF Strategists
- Hedge Funds

Search By

- Firm and Advisor Names
- Titles and Designations
- Location and Website
- Custodians
- Year Over Year Growth
- Assets Under Management
- ETF Assets by Ticker
- Equity Assets by Ticker
- Type of Business
- Investment Allocation
- Product Usage



Comprehensive 13F Targeting

RIA Database® captures ALL security holdings data on a quarterly basis, maps it to each RIA firm and makes it searchable and downloadable alongside key contact information.

EASILY TARGET RIA FIRMS

Ticker

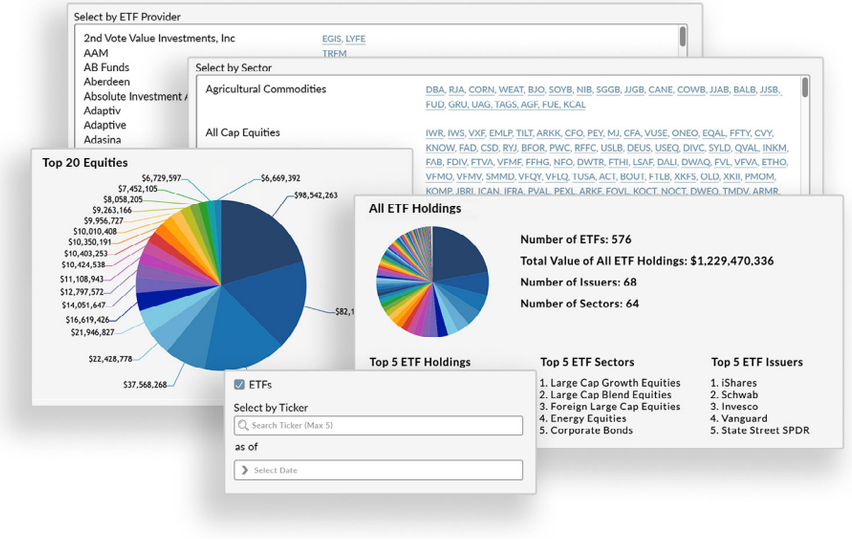
Pinpoint RIAs holding a specific ticker or multiple tickers simultaneously.

Provider

Identify RIAs holding your ETFs or ETFs from a competitive provider.

Sector

Discover how RIAs are leveraging ETFs & Equities in their portfolio.



Sample fields include:

- Total ETF Assets
- Historical ETF Assets
- Total Equity Assets
- Historical Equity Assets
- Mutual funds, SMA or Fixed Income Assets
- Current Market Value
- Current Quarter Shares
- Previous Quarter Shares
- Top Holdings by Firm
- Top Sectors by Firm
- Top ETF providers by firm
- ETF Buyers - Asset Managers
- ETF Buyers - Wealth Managers
- ETF Analyze Feature



RIA Channel®
RIA Database®

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