



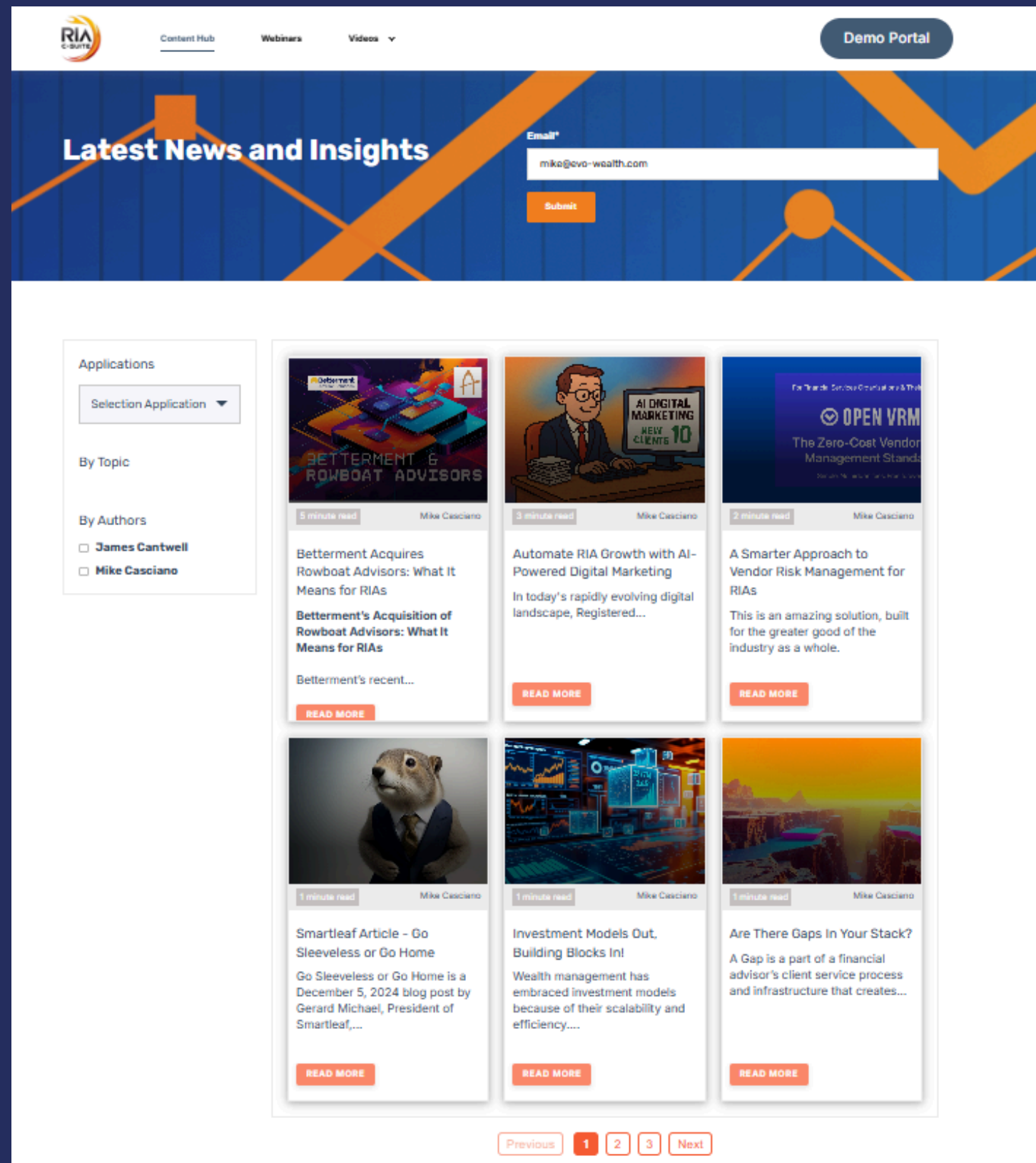
RIA Digital Marketing Platform

POWERED BY



Simple, Cost-Effective, Turnkey
Digital Lead Generation Solution

**Turnkey Direct Digital Marketing for
HNW Prospects and Advisor Acquisition Targets**



What is RIA C-Suite?

RIA C-Suite is a comprehensive content and digital marketing platform built specifically for RIA advisors and leadership.

The website features educational content, webinars, and an interactive demo portal to help advisors understand how to implement emerging technology and process enhancements.

It also offers a direct digital marketing platform that can be licensed for use by RIAs and Wealth Tech firms. It provides automated lead generation and targeted digital advertising for a fraction of the cost.

What is Direct Digital Marketing for Growth-Focused RIAs?

By combining AI-powered, emerging technologies, RIAs can easily and cost-efficiently identify, nurture, and convert target prospects into qualified leads and meetings, fully automated.



Organic Growth

Create a target list of ideal HNW client prospects based on Location, Income, Net Worth, Company, Job Title, Alma Mater and Catalyst Events.

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Inorganic Growth

Find and engage the best-fit RIA acquisition and lift-out targets with AI-powered intelligence to identify advisors and firms most likely to make a change.

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Lead Generation

Digital marketing platform identifies intent signals of targets. Nurtures interest through email and direct digital advertising to create qualified leads.

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Wealthfeed - Prospect Identification



Emerging Technology that scrapes and aggregates client and prospect data. Leveraging AI and data analytics, it allows wealth firms to identify prospects using characteristics and “Money-in-Motion” events. This creates a verified, high-intent target list for digital marketing campaigns.

wealthfeed

The AI-powered prospecting platform that provides real-time money-in-motion data to acquire new clients and grow wallet share.

What is WealthFeed?
Leveraging AI and advanced data analytics, WealthFeed identifies high-quality, High-Net-Worth prospects who recently experienced a “Money-in-Motion” event.

Users can utilize the WealthFeed platform to **Discover** new prospects based on search criteria, such as:

- Location
- Liquid Net Worth
- Industry
- Age
- Gender
- Alma Mater
- Company
- Job Title
- Income Range

When do clients look for a Financial Advisor?
According to a McKinsey survey, **42% of respondents** claimed to switch Financial Advisory firms due to a **Catalyst Event**...
...and life is full of Catalyst Events:

wealthfeed

Mike B.
Miami Beach, FL
Net Worth: \$2.5M-\$5M
Industry: Technology
Inheritance

Inheritances **Business Sales** **New Movers** **Divorces** **Promotions**

New Parents **Insider Sales** **Capital Raises** **Job Changes** **Marriages** **Retirement**

DISCOVER
Use WealthFeed’s advanced search engine to find money-in-motion prospects that fit your target niche!

ENRICH
Let us enrich your contacts with the data and information you need to qualify them and reach out!

MONITOR
Stay up-to-date on the latest life events across your book of business and be the first advisor to check in!

To learn more about Wealthfeed click the button to go to their website

[LEARN MORE](#)



RIA Catalyst - M&A Targeting



Similar AI-powered data scraping and aggregation platform to score and source RIA acquisition targets with predictive modeling. If inorganic growth is a priority, improve the odds of finding the right firms at the right time.

Meet RIA Catalyst

The AI-powered deal sourcing and diligence platform for modern M&A teams

We augment M&A teams who spend hundreds of hours:

- Sifting through fragmented data sources
- Verifying potential targets before even picking up the phone
- Completing manual, error-prone calculations

To reach their maximum potential by:

- Screening **100%** of the RIA market in seconds
- Sourcing advisors w/o paying **5-10%** trailing 1-year revenue
- Cutting down RIA target evaluation time by **4X**

We provide the expertise of a seasoned M&A professional with the scale of a data platform.

	RIA Catalyst	Competitors Fintrx, Discovery Data, AdvizorPro
Firm and advisor profiles	✓	✓
Market screening and prospect list creation	✓	✓
M&A specific screening filters such as owner age, profitability, productivity, and custodian.	✓	✗
Historical filings and acquisitions	✓	✗
Unlimited exports	✓	✗
Predictive acquisition score and custom scoring models	✓	✗

To learn more about RIA Catalyst click the button to go to their website

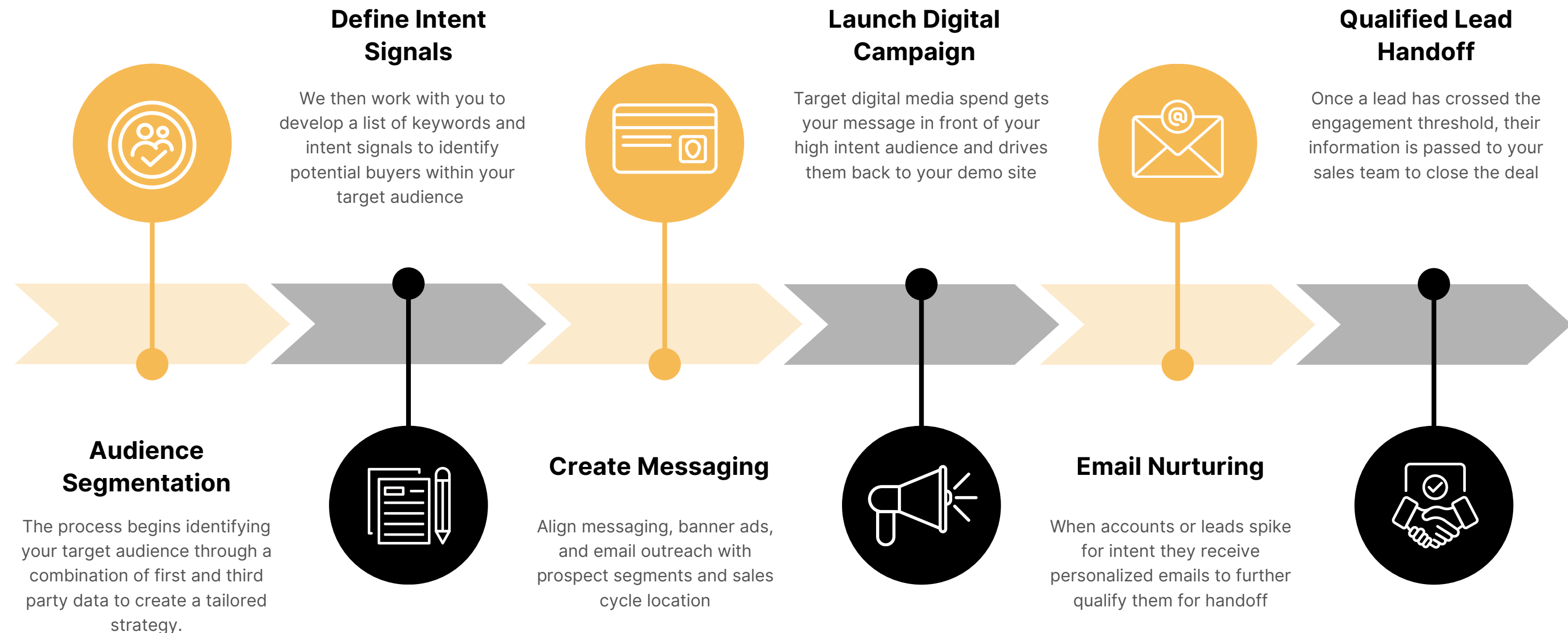
LEARN MORE



RIA C-Suite - Digital Platform



Centralized platform for targeted digital marketing, nurturing, and conversion of prospects to qualified leads. Provides an outsourced, managed solution that activates prospects and delivers qualified, engaged leads to the wealth firm for biz dev outreach or as scheduled introduction meetings.



How the 3 Platforms Work Together



WealthFeed:

**Triggered Prospect Discovery
(Organic Growth)**

Primary Function: Detect HNW individuals experiencing “money-in-motion” events (inheritance, job changes, divorce, etc.)

Key Features:

- Advanced filters for liquid net worth, life events, geography
- Enriches profiles with verified emails, financials, property data
- Sends automated handwritten notes + LinkedIn sequences

Marketing Use: Fuel organic lead generation campaigns with verified, high-intent contacts

Data Output: Contact-level lead data → CRM and Digital Marketing

RIA Catalyst:

**AI-Powered RIA M&A Prospecting
(Inorganic Growth)**

Primary Function: Score and source RIA acquisition targets with predictive modeling

Key Features:

- 100+ filters for firm characteristics (owner age, custodian, profitability)
- Acquisition Score based on HNW AUM growth, revenue per employee, deal history
- Verified owner/advisor contact info

Marketing Use: Identify and segment M&A prospects for outreach and targeting

Data Output: Firm-level intelligence + contact info → CRM and Digital Marketing

RIA C-Suite:

**Digital Engagement & Automation Hub
(Unified Execution)**

Primary Function: Centralized platform for targeted digital marketing, nurturing, and conversion

Key Features:

- Email automation triggered by intent signals
- Native + banner ads targeted to advisory firm personas
- Lead scoring and real-time CRM integration
- Content distribution, demo portals, de-anonymization of web traffic

Marketing Use:

- Launch prospect campaigns
- Nurture with content, automate follow-up
- Optimize conversion via tracked engagement and deanonymization

Data Output: Warm lead handoff with scoring

DIRECT DIGITAL ADVERTISING: MAXIMIZE YOUR PAID MEDIA SPEND WITH PRECISION TARGETING

Why Choose Our Platform?

Target the Right Prospects, Every Time

With our digital display platform, you can reach the specific targets you want, no matter where they are online. Instead of casting a wide net, we help you connect directly with the prospects who fit your target profile.

More Efficient Use of Your Budget

Unlike broad platforms like Yahoo Finance, where a direct ad buy can start at \$50,000 and reaches a general audience, our platform ensures your ads are seen only by the prospects who matter most to your business. This means you avoid wasted impressions and unnecessary costs.

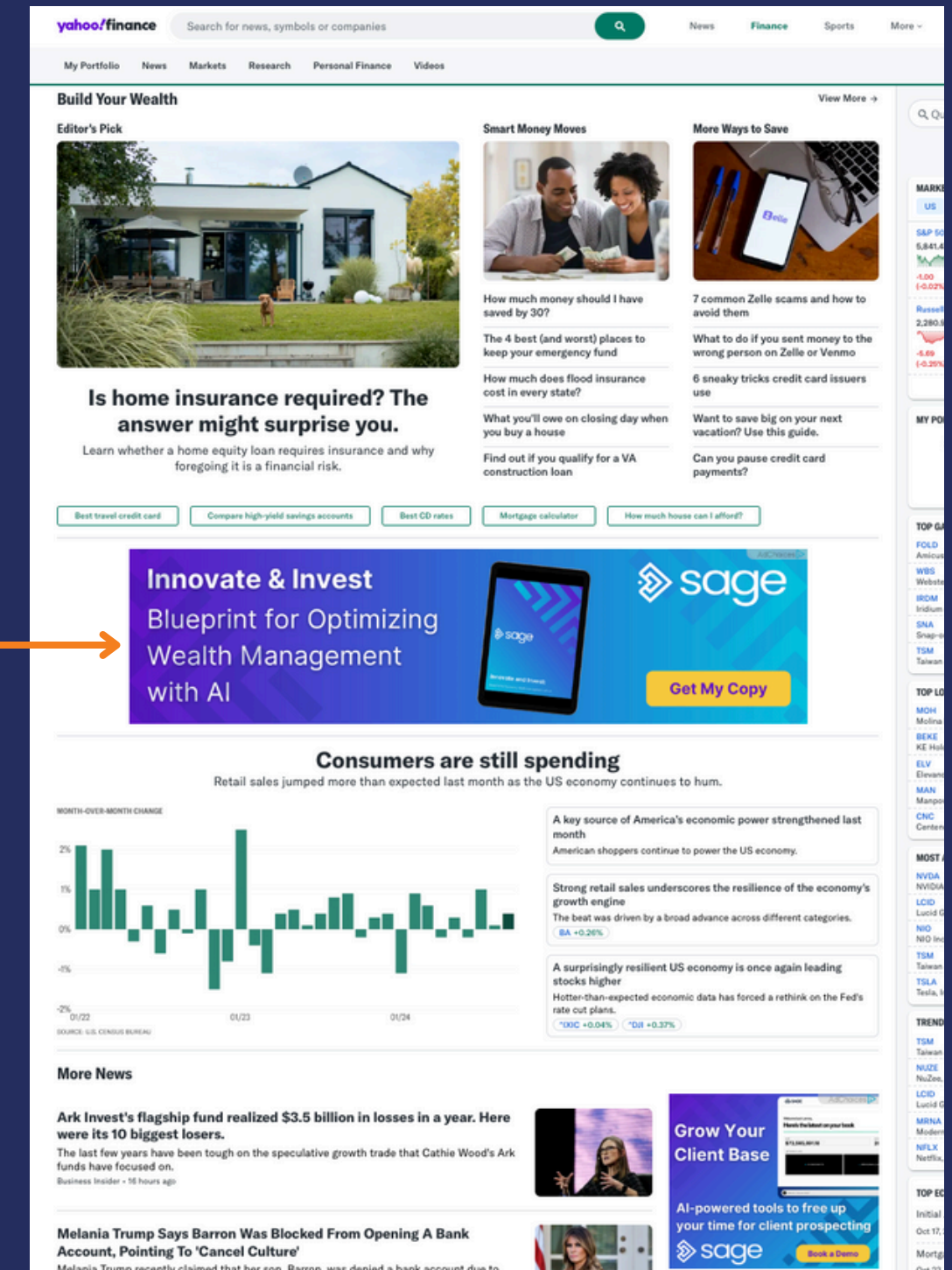
Flexibility & Control

Our model allows you to control your spending and adjust your targeting parameters in near real time, ensuring that your ad dollars are used efficiently. Get the right message to the right people at the right time.

Data-Driven Insights

We provide detailed performance metrics, allowing you to track engagement, measure ROI, and refine your strategy. With our platform, you can see exactly which people and firms are interacting with your ads and visiting your website.

This impression
on the homepage
of Yahoo Finance
cost 2 pennies



Solution Cost - Way Less Than You Expect

Pricing is unbelievably efficient because it is powered by technology. Wealthfeed and RIA Catalyst leverage AI and data analytics to evaluate publicly available information. The digital marketing platform is a combination of multiple enterprise solutions that are tested, integrated and managed by an experienced digital marketing team. Accessing only the bandwidth you need makes this affordable.

All three solutions are in market. Combining one or both prospect inputs into a coordinated platform that is managed by experienced marketing pros is game changing. It reduces the burden on firms to hire and develop scarce digital marketing talent. It frees up valuable time firms are investing to generate qualified leads. It significantly reduces the cost of new client/advisor acquisition.

The annual cost for a fully automated, digital marketing campaign that can generate ideal, highly-engaged qualified leads immediately is less than just one junior marketing or business development person. It is tremendously less expensive than paying an outside marketing consultant or hiring an agency.

To determine which solutions are of interest and receive a simple price estimate, email Mike Casciano, mike@riacsuite.com, or click the schedule a meeting button on the last page.

Unrivaled Marketing and Tech Experience



Lead Marketing Engineer

Erin is a skilled marketing strategist with expertise in digital marketing, CRM implementation, and channel strategy. She has a proven track record in both corporate and entrepreneurial environments, consistently delivering effective marketing solutions. Erin excels in crafting strategies, developing projects, and analyzing market trends, which contribute to brand growth and operational efficiency for her clients.



Smartlead.ai



Mike Casciano
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Mike has spent over twenty years in the wealth industry. He began his career as a financial advisor. For over 15 years, he held many roles at BlackRock ranging from wholesaler, portfolio consultant, wealth tech joint venture platforms, and advisor training. At Principal, Mike created a joint venture to distribute Principal models and custom indexes to RIAs through third-party portfolio overlay management providers. He also built a proprietary risk analytics platform and established their portfolio consulting business for advisors. In 2023 he started EVO Wealth Consulting to help RIAs implement emerging technology and process enhancement. In 2024 he launched RIA C-Suite to provide educational content for the industry focused on emerging tech.

Connecting Wealth and Tech Through Data Led Digital Marketing

[Schedule a Meeting Here](#)