



MarketPro

Powered by Discovery Data



Comprehensive Distribution Intelligence.

MarketPro powered by Discovery Data provides data, insights, and analytics on the firms and professionals driving the financial services and insurance industries. Our actionable intelligence enables asset and wealth management firms, insurance companies, and service and technology providers to target financial professionals including advisors RIAs, broker-dealers, trust companies, and insurance agents, to identify opportunities and execute go-to-market initiatives more effectively.

We have comprehensive datasets and decades of experience to help you:

- Go-to-market quickly and effectively
- Accurately profile, segment, and target segments
- Build and manage territories and sales lists
- Recruit advisors and agents
- Customize delivery methods for seamless integration into your workflows



94%

of business leaders suspect they have inaccurate data*

*Source: ChiefExecutive.net

The market leader in financial services industry data, insights, and analytics.

3.0B

Data Points
Updated Annually

3.1M+

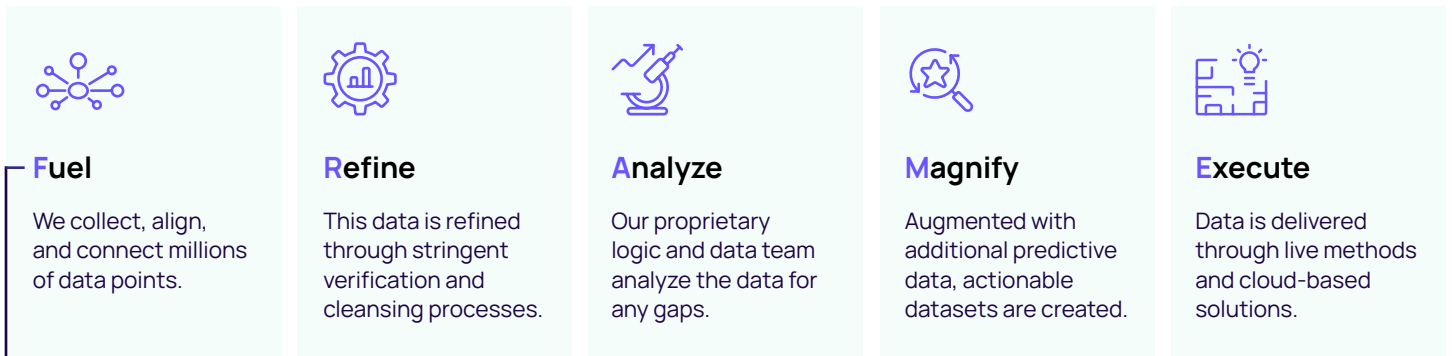
Professionals
& Key Staff

47K+

Financial
Firms

FRAME

Behind delivering the most accurate and impactful data for the financial services and insurance industries is FRAME, our proprietary process that allows us to continuously organize disparate data sources to validate, align, augment, and deliver actionable insights. With FRAME, you can utilize the widest spectrum of trusted data sources and have the foresight to capitalize on industry trends.



Unlock Market Opportunities

It all starts with accurate data.



Financial Services

The most complete source for consolidated financial services data on 760K financial advisors and key staff, 44K firms, and 200K branch offices.

- Access insights on BD and RIA firms and professionals, as well as trust companies and key staff
- Build territories and sales lists
- Target opportunities by product interests, AUM, and more
- Augment your current database
- Track new advisors and firms
- Data filters, tools and enrichment for more accurate profiling and segmentation



Insurance

The most accurate data on over 2.3 million insurance agents.

- Target and track licensed insurance agents in U.S.
- Segment by type, speciality and more
- Prioritize with detailed profiles on agents and producers
- Connect with agents through multiple channels



Specialized Datasets

Premium data insights to help you deliver the right message at the right time.

- **Intent:** Predictive advisor data intelligence allowing you to target based on expressed interest in your product or firm.
- **Diversity & Inclusion:** Get accurate and actionable intelligence on rep and agent diversity with insights on race, ethnicity, and more.
- **Advisor IP Match:** A dataset of advisor IP addresses matched to MarketPro business profile and contact information for clearer insight on who is visiting a client's website.

Product Solutions

Access our data how you want it, when you want it. Our robust tools bring efficiency and productivity, enabling you to surface, reach, and activate your target segments and empower you to make the decisions to help your organization grow faster than ever.

My Marketplace

Professionals Firms Branches AUM

Filters

FIRST NAME	LAST NAME	TITLE	EMAIL	PHONE
Joseph	Advisor	Advisor, Portfolio Manager	joe.a@example.com	555-245-7655
Amy	Advisor	Advisor	amy@example.com	123-600-3490
David	Agent	Advisor, Planning Specialist	david@example.com	555-506-2850

MarketPro

Market intelligence platform with the tools to surface clear opportunities and trends.

MarketLink

API and Feed integrations combined with Cleansing and Enrichment to uplevel your platforms.

Contact

First Name	Joseph
Last Name	Advisor
Company	RIA Capital
Phone Number	504-585-1234
Email Address	name@example.com
Title	Financial Advisor, Vice President
Discovery Data Status	✓ Updated

Email Campaign Report

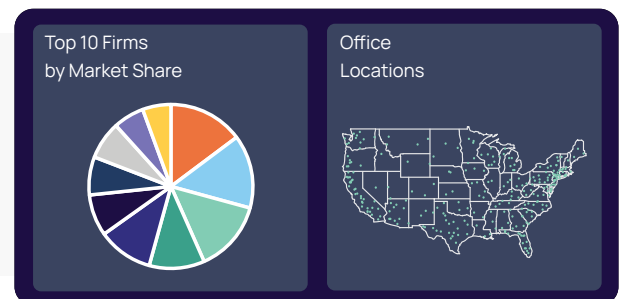
Subject Line	We are hiring!
View Email Creative	
<p>90% Deliverability</p>	Delivered: 100,730
	Opens: 5,417
	Clicks: 362
	Form Submissions: View
Phone Leads: View	

MarketReach

Your strategic partner delivering data-driven insights, marketing, impact, and revenue growth.

MarketPro BI

Visualize data and insights in one place.



Client Success

Clients who work with MarketPro operate with precision to close more deals, find new opportunities, and recruit better people and partners. Our complete, proven process utilizes the widest spectrum of trusted data sources and empowers clients by giving them the foresight to capitalize on industry trends. Our solutions and tools give clients complete confidence in their data-driven decisions, enabling them to put strategies in motion.



Professional Services

From API and data feed integration support to managed services capabilities, our team can ensure that your team doesn't miss a beat.



Analytics Support

Our team has a deep understanding of best practices in surfacing new opportunities.



Platform & Data Support

Beyond being platform and data experts - our team can provide the support with a dedicated Client Success associate, and training to empower teams.

Ready to Grow?

Visit issmarketintelligence.com to learn more.

About ISS Market Intelligence



ISS Market Intelligence (MI) is a leading provider of data, insights, and market engagement solutions to the global financial services industry. ISS MI empowers asset and wealth management firms, insurance companies, distributors, service providers, and technology firms to assess their target markets, identify and analyze the best opportunities within those markets, and execute on comprehensive go-to-market initiatives to grow their business. Clients benefit from our increasingly connected global platform that leverages a combination of proprietary data, powerful analytics, timely and relevant insights, in-depth research, as well as an extensive suite of industry-leading media brands that deliver unmatched market connectivity through news and editorial content, events, training, ratings, and awards.