



FAMILY OFFICE DATABASE

The most effective tool to reach out to
Family Offices all over the world

WALL STREET OASIS

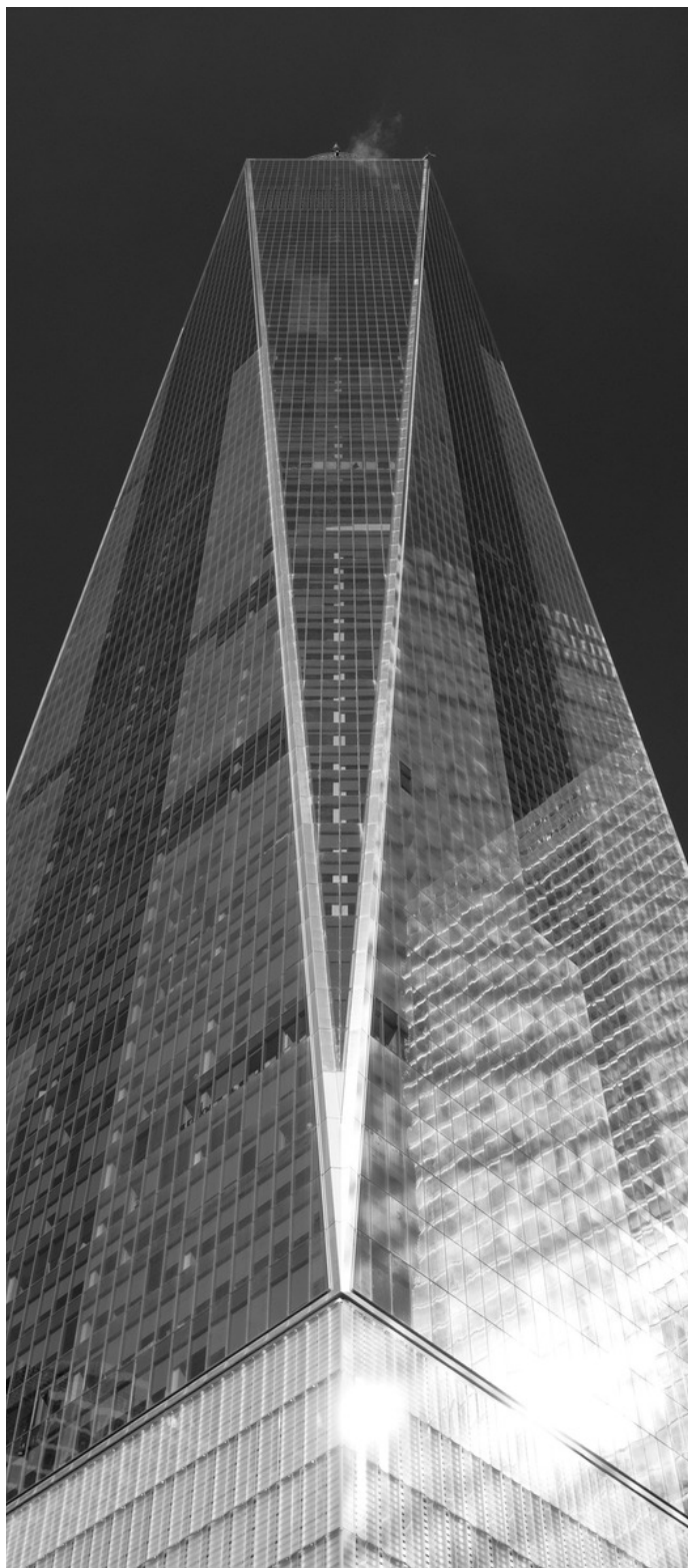


MARKET OVERVIEW & THE WSO APPROACH

- Access to a high quality family office and investor database can cost up to \$10,000. You can also get access to lists closer to \$2,000 - \$3,000 but typically they are out of date, littered with invalid emails and use very little verification or testing
- WSO is the largest online community focused on careers in finance with over 700,000 registered members and millions of visitors each month. We have already crowd-sourced an incredibly accurate company database with over 80,000 data points over the last seven years.
- After seeing the options available to smaller funds and companies looking to reach these investors, we knew we could leverage the power of the community to crowdsource the largest, most transparent and most accurate list in the world for family offices...AND offer it at a fraction of the price
- Through July 2019, we have received over 23,000 contacts from contributors. Using a combination of techniques (rigorous manual checking paired with expensive software) we've trimmed that down to a list of over 2,500 verified & high quality contacts. We still include the invalid and lower quality submissions so that you can see the work our team has put in to deliver the most accurate data possible
- We regularly update our list with new information. We apply the same rigorous testing to each new batch (along with retesting old data) to make sure you're always getting accurate information. If you decide to purchase access you'll receive all updates free for an entire year.



CONTACT QUALITY GUIDANCE



High Quality (HQ)

- This list contains emails that we've validated as currently active email addresses
- ~94% have either a phone number or LinkedIn account listed. 58% of the contacts in the HQ list have phone #s. ~80% have LinkedIn accounts
- Addresses marked with DARK GREEN are personal emails. LIGHT GREEN emails are high quality catch all email addresses.
- These catch all addresses may be answered by someone other than the named contact, however, they are usually reliable and should still be forwarded to the contact in question the majority of the time.

Low Quality (LQ)

- Contains the contact details for valid emails with a lower quality score.
- Emails sent to this address will actually be sent to the company email inbox, as opposed to a specific person's inbox.
- These emails have a 10%+ chance of bouncing or being rejected.
- This can harm your domains trust rating. We highly recommend using a separate email service or domain in order to reach out to these email addresses if you decide to email them

Bad Quality (Bad)

- This list contains the contact details for peoples who's email address we have confirmed as no longer active.
- This usually Indicates that the contact no longer works at the company in question.
- This isn't always the case, and even so, it may be worth attempting to call the number listed, it will likely still go through to the company, even if the person you reach isn't the named contact.



FAQ & ACCESS GUIDE

- **How do I access the Family Office Database?**

Once you sign up you'll be sent an email providing access to the database. Inside the Google Sheets document you'll see a number of sheets. These are labelled and you can see a detailed breakdown of their purpose on the previous page.

- **Can I export the information in the database?**

Yes, you absolutely can, you can export the database in a number of different formats for use in other tools or CRM's

- **How often do you update the database?**

This depends on the data pipeline, but usually we manage an update every month or two.

- **How do I sign up?**

Just click on the link below to get immediate access

[Click Here to Access Now](#)



Family Office Database Update

V4, 2019 | September

OVERVIEW

New Contacts

2191 ▲ 46%

New Firms

1156 ▲ 83%

Price

\$795 ▲ 50%

STATS

TOTAL COUNTRIES

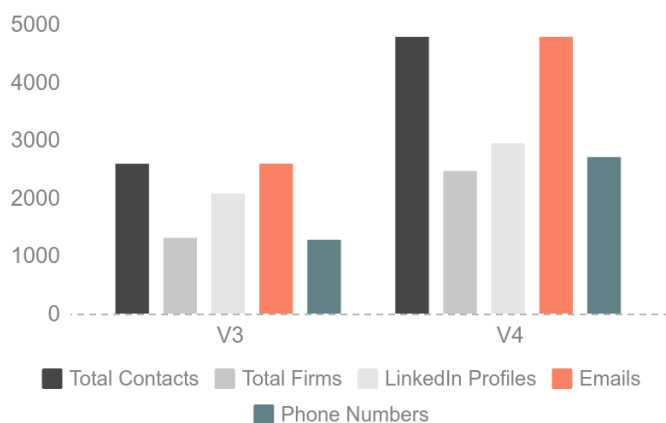
65

~90

DAYS TILL NEXT UPDATE

SOURCE OF APPLICATION

V3 => V4



New LinkedIn Profiles

860 ▲ 30%

New Phone Numbers

1428 ▲ 104%

TIPS

- This list contains both single and multi family offices
- There are a handful of other investment firms, mainly due to contacts who've changed firm
- Don't send too many emails all at once, you could give your email domain a bad reputation

