



## Introducing Referral-EDGE<sup>SM</sup>

A dynamic business development tool designed to help you execute your growth strategy

Referral-EDGE<sup>SM</sup> is an interactive, Web-based tool developed by Infinata, Inc.,<sup>1</sup> and customized for National Financial clients. Referral-EDGE taps into an extensive database of timely, relevant, and public information on high-net-worth individuals, retirement plans, centers of influence (COIs), foundations, and endowments. It can help you gain insight into your existing clients, uncover qualified prospective clients, and network with influential professionals. Use it to help develop richer relationships and uncover strong connections for referrals.

### GROW YOUR BUSINESS

It could take hours to research the data that Referral-EDGE makes available in seconds. This dynamic online platform aggregates and synthesizes rich and detailed public information to help you:

- Prepare for meetings with pertinent, up-to-date information
- Gain insight into professional and social networks
- Turn “cold” leads into “warm” leads

### A WEALTH OF INFORMATION

Referral-EDGE allows you to quickly search more than 3 million public records, from more than 3,000 U.S. sources updated daily, including:

- Over 3 million high-net-worth individuals
- More than 1 million companies
- 1 million+ retirement plan contacts
- Close to 150,000 foundations and endowments with over \$1 million in assets

### IDENTIFY REFERRAL OPPORTUNITIES

The tool generates a vast amount of actionable data. Each month, Referral-EDGE adds more than 12,000 executives, reports nearly 30,000 wealth-creating events, and processes over 2,000 foundation and endowment updates.

You can quickly learn more about your clients and research prospects. With Referral-EDGE, you may identify strong connections and build strategic alliances that could lead to referrals. Take advantage of the possibilities:

- Identify board memberships, alumni, coworkers, and industry peers
- Discover COIs—including CPAs and accountants, attorneys, and insurance agents
- Find niche marketing opportunities
- Stay up to date on wealth-creating events like new job appointments and promotions, mergers and acquisitions, and trading activity

## SIMPLE TO USE

Referral-EDGE easily adapts to your preferred business development strategy. You can customize your view and search a wide array of variables, including demographic data, geographic location, level of assets, professional affiliations, and more. E-mail, print, or export your search results into Excel or your CRM system.

**Referral-EDGE** Brought to you by National Financial

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**HOME**  
**ADVANCED SEARCHES**  
▶ High Net Worth People Searches  
▶ Wealth Creating Events  
▶ Retirement Plan Searches  
▶ Foundation Searches

**USER TOOLS**  
▶ User Tools  
▶ Support

**LOGOUT**

**Quick Search**

Quick Search Options: HNW People Search  
Wealth Score: --Select--  
Title: --Select--  
State: --Select--  
Search More Options

**Support & Ideas**

Sign up for a Referral-EDGE Webinar training session to review best practice methods and receive helpful tips for navigating the site.  
▶ Register for a Webinar  
▶ Best Practices

**Money in Motion**

Number of Results 243 1 ... 81 Next > Results per page 3

Date	Executive	New Role	Company	Type of Development	
2010-10-07	Joe Client	Chairman	ABC Firm	New Appointment	View Full Details
2010-10-07	John Q. Sample	Managing Director	XYZ Company	New Appointment	View Full Details
2010-10-07	Kate Prospect	President	Example Bank	New Appointment	View Full Details

1 ... 81 Next >

**Insider Transactions**

Number of Results 3319 1 ... 1107 Next > Results per page 3

Date	Company	Ticker	Executive	Title	Acquired/Disposed	\$Amount
2010-10-07	Startup Inc.	SXYZ	Doe, Jane	Co-Founder, Chairman And Chief Executive Officer	Disposed	N/A

**My Saved Searches**

Number of Results 2 Results per page 3

Date	Saved Search/Report	
2010-07-26	Ultra Wealthy - MA	View Results
2010-07-26	Disposals 02108	View Results

**My Tracked Executives**

Number of Results 6 1 ... 2 Next > Results per page 3

Name	Company
Alpha, Andrew	ABC Firm
Beta, Beth	XYZ Company
Gamma, George	Startup Inc.

Screenshot is for illustrative purposes only.

## GET STARTED TODAY

Referral-EDGE is complimentary for National Financial clients who are actively committed to growing their practice. Contact your home office for login and training information. Learn how you can take advantage of this exciting new tool's capabilities, and find out how to unlock its full potential.



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For more information, please contact your home office.

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