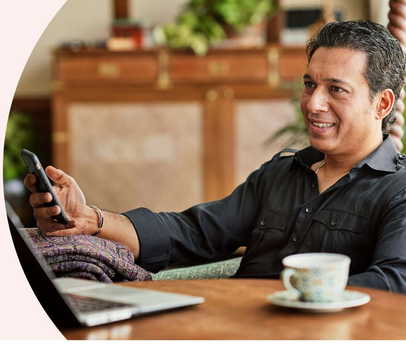
LinkedIn Sales Solutions

Sales Navigator for B2C Wealth Managers & Financial Advisors



Turn cold calls with potential clients or HNWI into warm introductions through modern selling.

3 simple steps to find and engage HNWI with Sales Navigator

1. Easily find and get notified on life events of HNWI

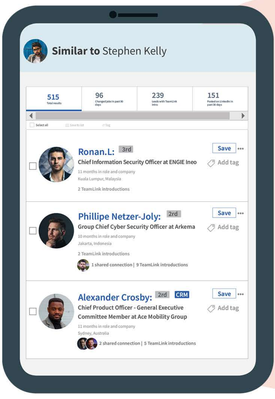
Using Sales Navigator's **30+ Advanced Search filters and Spotlights,** you can immediately target HNWI and receive real-time alerts about them by saving them as leads.

You can also quickly find similar HNWIs by simply cloning your best prospects.

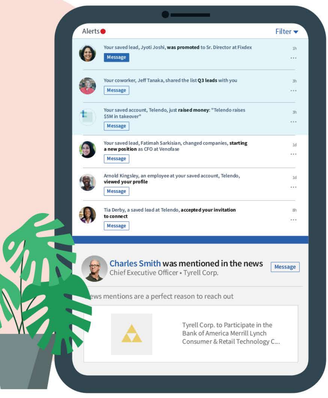
Members in the Mass Affluent[1] & HNWI segment

13.8M+

NAMER



2. Stay informed & up-to- date on your prospects' activity



Get real-time updates on your saved leads automatically such as **key life events, job changes, promotions, money in motion, activity on LinkedIn and mentions in the news** on a dedicated alert feed.

This way, you won't miss any important updates that might get lost in your basic LinkedIn feed.

76%

of the Mass Affluent & HNWI on LinkedIn are not yet connected or saved as leads by wealth managers or financial advisors[2]

Top Job Titles

- President
- Retired
- Owner
- Chief Executive Officer
- Vice President

Top Industries

- Financial Services and Insurance
- Professional Services
- Government/Education/Non-Profit
- Healthcare and Pharmaceutical
- Technology – Software

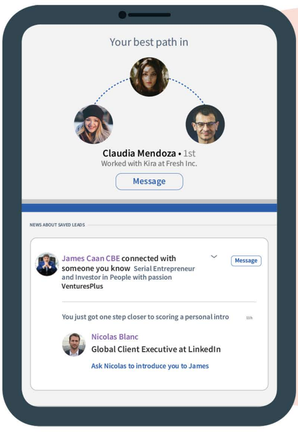
3. Reach out through referral opportunities or InMail

Find out how you can get referred to a prospect through your connections or your company's combined network.

Use InMail to directly contact prospects, even if you don't have their email address.

You will also get automatically alerted when someone in your network connects to one of the leads you're following.

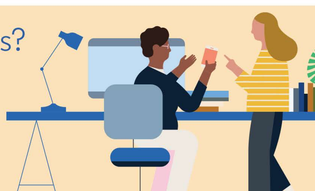
3X higher response rate for InMail than emails[3]



Ready to speak to our experts?

Learn more about how Sales Navigator can help you easily attain your sales goals.

Request a free demo



Source: [1] Mass Affluent is a model based segment of members who passes over $100K in investable assets.
[2] Includes private bankers, financial advisors, consultants and wealth manager titles and accounts.
[3] LinkedIn Internal Data