MyIntentData™ for Financial Advisors

WHITEPAPER

The Intelligent Data Marketing System™

For financial advisors. From attention to intention, and from raw intent data to booked business, without buying the same leads as everyone else.

The shift from the attention economy to the intent economy, quantified, sourced, and applied.

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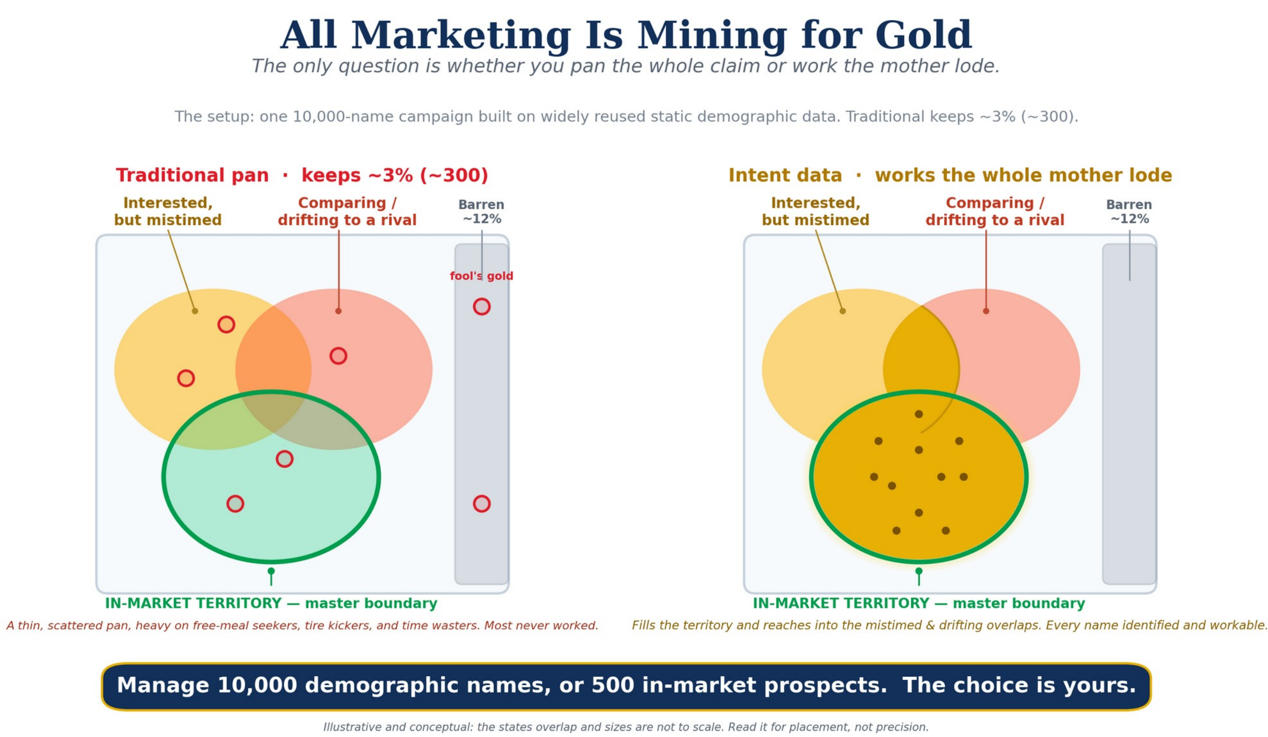
1. Executive Summary

For a century, marketing has been an attention business. Buy enough reach, repeat the message often enough, and a small fraction of the audience, historically about 3%, responds. A 3 to 4% response to a prospecting campaign is still considered a strong result. But you paid to reach the whole audience. That 3% is simply the slice that happened to be ready on your day, in your channel.



All marketing is mining for gold: the traditional pan keeps a thin, scattered ~3%, while intent data works the whole in-market mother lode and the near-market it recovers (illustrative and conceptual).

The other 97% did not vanish. Their interest, once created, is liquid: it flows to whoever shows up next, the competitor's seminar a week later, a national firm's ad, the first call returned. Much of your spend is not wasted so much as working, for someone else. The harder you market without a way to capture that demand, the more you subsidize the competitors you are trying to beat.

THE CORE IDEA

Attention marketing keeps roughly the 3% who respond today. The Intelligent Data Marketing System™ (IDMS™) reaches the rest of the demand you created, and, unlike a raw data feed, it hands you the reports, record data sheets, and ready-to-send content to turn that demand into booked revenue. The advantage is concentration: instead of paying to reach a whole ZIP to find the few who are ready, you reach the few directly. IDMS™ is delivered as one system, records and the deployment Playbook together, not data alone.

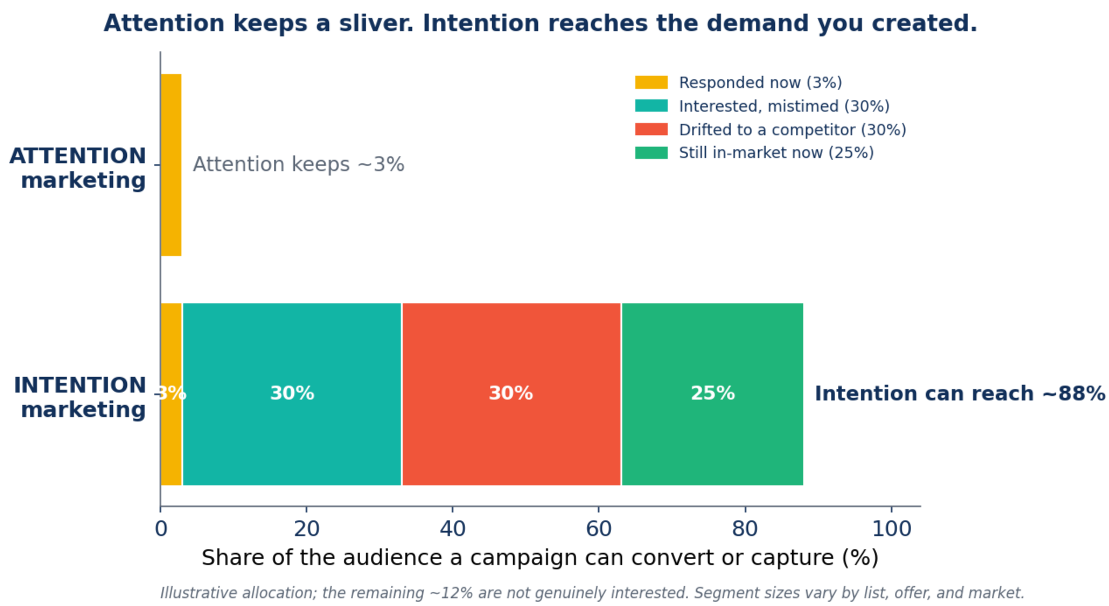


Figure 1. Where a broadcast campaign's demand actually goes (illustrative allocation).

This shift, from the attention economy to the intent economy, is being forced by measurable pressure on the old model: acquisition costs up roughly 222% in eight years, display ads clicked about six times in a thousand, nearly a third of users blocking ads outright, most buyers researching independently before they ever engage, and the third-party tracking behind legacy targeting fragmenting. Every figure in this paper is sourced to independent research and cited at the end.

This paper makes the case for that shift and shows how the Intelligent Data Marketing System™ from Elite Wealth Network, delivered through the MyIntentData™ platform, turns anonymous, in-market demand into identified, reachable prospects and the content to close them. For a financial advisory practice, it also adopts a metric more honest and more useful than ROAS: ROMS, Return on Marketing Spend.

2. The Attention Era and Its 3% Ceiling

Every traditional channel, direct mail, seminars, webinars, radio, television, print, Facebook, and the rest, was built to do one thing: capture attention and bend it toward a brand. The playbook was reach and frequency: put the message in front of enough people enough times, and a sliver of the audience raises a hand.

That sliver has always been small and remarkably consistent. A 3% response to a prospecting drop counts as a success. The entire economic model of attention marketing is built on monetizing roughly the top few percent of any audience, the people who happened to be ready at the moment the message reached them.

> *"Attention marketing was never built to move the market. It was built to skim the small share of the market that was already moving."*

The problem is not that 3% is a bad number. The problem is everything the model leaves on the table, and the fact that the cost of reaching that 3% keeps climbing while its size stays fixed. When you pay for a whole audience to convert a fraction of it, your economics are hostage to the price of attention. And the price of attention has never been higher.

There is a subtler problem, too. Attention marketing answers the wrong question. It spends heavily to persuade a passive audience of who to buy from, while the modern buyer has already decided they will buy and is instead researching what to buy. Their research rarely begins with your brand; it begins with the problem. By the time they surface, the decision is largely made.

~3%	~60%	~40%
Your response to marketing	Of that response: free-stuff seekers, tire kickers, time wasters	Of that response: actually in-market, and only by luck

ZERO INTENT QUALIFICATION: LUCK OF THE DRAW

That 3% response is bad enough. Roughly 60% of even that is free-meal seekers, free-information grabbers, tire kickers, and time wasters. Only about 40% is genuinely in-market, and only by chance, because the list was built on static demographics alone, with no intent check at all. Which names are actually in-market is pure luck of the draw. Intent data removes the luck: every record is identified as in-market.

3. The Intent Economy: A Definitional Shift

Intention marketing is not a better version of attention marketing. It is a different discipline aimed at a different moment. Attention interrupts people who are not thinking about you. Intention answers people already looking for what you sell. The distinction runs through every dimension of how a campaign is conceived, targeted, and measured.

Dimension	Attention Marketing	Intention Marketing
Primary goal	Brand awareness and reach	High-converting action and utility
Buyer state	Passive, scrolling, consuming content	Active, researching or solving a problem
Timing	Interruptive; relies on ad repetition	Predictive; reaches people at the moment of need
Primary data	Impressions, CTR, demographic segments	First-party plus intent signals and behavioral triggers
Strategy	Broad, one-way messaging	Personalized, solution-oriented outreach
Measured by	Reach, frequency, CPM	Return on Marketing Spend (ROMS)
Competitive edge	Audiences rivals can also buy	Demand captured before it reaches a competitor

Table 1. The same buyer, two fundamentally different ways to reach them.

Read the table as one argument: the attention column is organized around the seller's calendar and the platform's inventory; the intention column is organized around the buyer's moment of need. One optimizes for being seen. The other optimizes for being chosen.

> *"Better audiences beat better optimization, every time."*

4. Where the Other 97% Goes

The clearest way to feel the difference is to follow the money after a broadcast campaign. Picture the full audience you paid to reach for a considered purchase, a new roof, an HVAC system, a financial advisor, a software platform. Good marketing works on the whole audience: it raises a question and moves the needle. But it captures only the few who are ready that day.

~3%	~30%	~30%	~25%
Responded to you now	Interested, but mistimed	Drifted toward a competitor	Still in-market right now

This is an illustrative allocation, segment sizes vary by list, offer, and market, but it makes the dynamic visible. Attention marketing keeps the first band and lets the rest leak into the market. The remaining demand is real, and much of it is reachable: people interested but not ready on your day, people already comparing you against a competitor, and a sizable segment actively researching your category now.

THE ECONOMICS IN ONE LINE

Every buyer you reach from the 'drifted toward a competitor' band is revenue you recover and a rival loses, often funded by their ad spend, not yours. IDMS™ is the system to identify that demand and keep reaching it until the buyer chooses you.

WHY DEMOGRAPHICS CANNOT FIND THEM

This is not a targeting problem a better mailing list can fix. For a high-consideration consumer purchase, an annuity, life insurance, a financial advisor, a new roof, the share of the audience actually in-market at any single moment is small, roughly 0.5% to 3% (Figure 4). A list built on demographics alone has no way to tell which names those are, so it is luck of the draw and most of the spend lands on people who are not buying now. Intent data identifies them directly, which is why concentration, not reach, is the entire game.

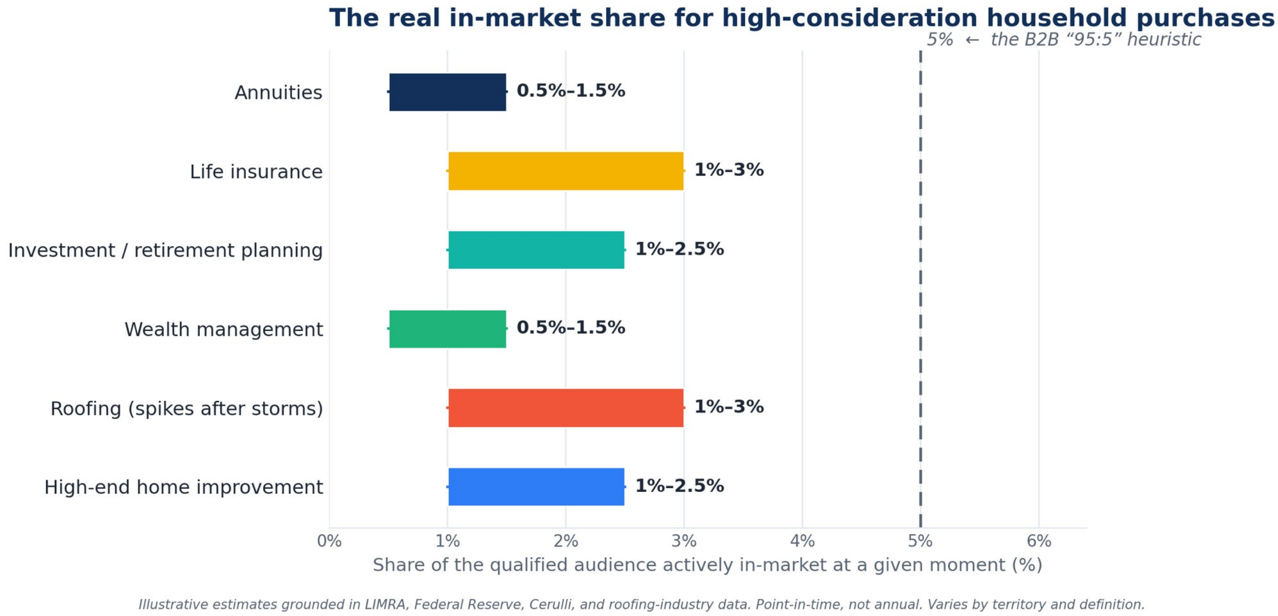


Figure 4. The real in-market share for high-consideration consumer purchases sits well under the 5% business-to-business benchmark (illustrative estimates grounded in LIMRA, Federal Reserve, Cerulli, and roofing-industry data).

5. The Intelligent Data Marketing System™ (IDMS™)

Buying data is not the same as getting results. Most vendors hand you a spreadsheet of raw signals and wish you luck. That raw data is their whole product, and it leaves you to build the content and the process before a single prospect hears from you. The Intelligent Data Marketing System™ from Elite Wealth Network is different. It is a full-circle system that starts with intent and does not stop until you have something you can send.

1. Model the intent, by vertical

IDMS™ models intent data for your specific business vertical, so the signals map to how your buyers actually behave, not a generic average.

2. Transform raw data into something usable

It takes the overwhelming raw data that is most competitors' only deliverable and, through our exclusive process, transforms it into clear, actionable reports and expanded, easy-to-understand record data sheets built for real marketing and sales outreach.

3. Hand you the content, the Records-To-Revenue Tactical Playbook™

Data alone still leaves you to write everything. Every IDMS™ engagement includes the Records-To-Revenue Tactical Playbook™, an Elite Wealth Network exclusive: a done-for-you 10-email sequence, 5 marketing letters for mail or a direct, personal email approach, and 5 phone scripts, each with a matching voicemail script for when you reach a recording instead of the prospect.

4. Go one to one, Digital DNA Power Marketing™

For a specialized, high-touch option, Digital DNA Power Marketing™ reads the digital signals unique to each prospect and creates one-off email, letter, and phone outreach that speaks to individual propensities such as travel, wine, food, and hobbies. It is custom designed and priced on a consulting basis.

Integrated, not optional

The Playbook is not an add-on. Records without deployment fall flat for the many end users who are not marketers, so IDMS™ is delivered as one system: the modeled records and the done-for-you content together. It is included on every qualifying order, a single pull of 500 or more records and all 90-day and 12-month programs, so you are never left with data and no way to use it.

FOUNDERS OFFER: ONBOARDING FEE WAIVED (FIRST 100 ORDERS)

The one-time onboarding that creates and delivers your Records-To-Revenue Tactical Playbook™ is normally $2,997, the same for every cadence. For the first 100 qualifying orders it is WAIVED in full, a $2,997 value at no cost: your order shows the $2,997, then a Founders credit brings it to zero. Qualifying orders are single-pull orders of 500 or more records and all 90-day and 12-month programs; single-pull orders under 500 records do not include the Playbook. Records are billed separately by the cadence you choose. Spots are limited, and offer terms apply.

RAW DATA VERSUS A SYSTEM

Most vendors sell the raw material. IDMS™ delivers the finished result: modeled intent, usable reports and record data sheets, and the content to deploy them. That is the full circle, from a signal to booked revenue.

6. For Financial Advisors

If you sell a considered, trust-driven decision, and few decisions are more considered than who manages a family's retirement, IDMS™ is close to an unfair advantage. A seminar or mailer raises the right question, am I paying too much in fees and is my retirement really on track, and it moves people. But that interest is liquid: it flows to whichever advisor follows up first. You paid to create the demand; without a way to capture it, you fund a competitor's pipeline.

- Stop buying aged, shared leads sold to a dozen advisors at once.
- Reach the households actively researching advisors, fees, and retirement in your area now.
- Recover the prospects who would otherwise drift to the competitor who called first.
- Deploy the done-for-you Records-To-Revenue Tactical Playbook™ instead of writing every email, letter, and script yourself.
- Measure the whole effort with ROMS, not just the ad platform's ROAS.

Dimension	Traditional advisor marketing	IDMS™
Who you reach	Whoever RSVPs to a seminar or lands in a mailed ZIP	Households researching advisors, fees, and retirement now
Timing	Your seminar calendar or mail drop	The moment they begin researching
Typical yield	About a 3% response is a good day	Concentrates spend on the households actually in-market now
Captures the rest?	No	Yes, sustained until they choose you
The content	You write the emails, letters, and scripts	Done for you in the Records-To-Revenue Tactical Playbook™
Measured by	Cost per attendee or per piece	ROMS (Return on Marketing Spend)

Table 3. Traditional advisor marketing versus the Intelligent Data Marketing System™ (illustrative).

Model the economics for your practice in the calculator at elitewealthnetwork.com and myintentdata.com before you spend a dollar.

7. Getting Started

The shift from attention to intention does not require replacing your stack. It requires adding the system your competitors are missing.

- Model your numbers in the calculator to see the cost and ROI for your vertical.
- Choose your territory and request in-market records for the areas you serve.
- Deploy the Records-To-Revenue Tactical Playbook™, an Elite Wealth Network exclusive, and set ROMS as the scorecard.
- Ask about Digital DNA Power Marketing™ when you want one-to-one, propensity-based outreach.

Elite Wealth Network, Inc. built the Intelligent Data Marketing System™ to make this practical for businesses that cannot afford to waste a dollar on attention that never converts. The market in motion is already researching your category. The only question is whether it finds you, or the competitor whose message arrives first.

FOUNDERS OFFER: ONBOARDING FEE WAIVED (FIRST 100 ORDERS)

The one-time onboarding that creates and delivers your Records-To-Revenue Tactical Playbook™ is normally $2,997, the same for every cadence. For the first 100 qualifying orders it is WAIVED in full, a $2,997 value at no cost: your order shows the $2,997, then a Founders credit brings it to zero. Qualifying orders are single-pull orders of 500 or more records and all 90-day and 12-month programs; single-pull orders under 500 records do not include the Playbook. Records are billed separately by the cadence you choose. Spots are limited, and offer terms apply.

MODEL IT, THEN OWN YOUR TERRITORY

Compare your current marketing costs and download the sourced studies at elitewealthnetwork.com and myintentdata.com. See who is in-market for what you sell, and capture the demand you are already paying to create.

Request a Demo

REQUEST A DEMO

See who is in-market for what you sell. Scan to book a 30-minute call, or reach us directly.

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Scan to book a 30-minute demo

References & Sources

Every factual claim in this paper is supported by at least three independent sources, each opened and verified as live and on-point in July 2026. Sources are grouped by the claim they support.

The standard edition summarizes the evidence; the comprehensive edition lists every source in full. All figures cited are independently sourced and verified.

Notes on figures: the audience allocation in Figure 1 and the ROI and ROMS curves in Figures 2 and 5 are illustrative; they show the dynamic, not audited results, and are labeled as such. Response and conversion figures cited are third-party industry estimates that vary by list, offer, and execution and are not guarantees. This document is educational and illustrative only, and is not investment, tax, insurance, or legal advice. Intent data is not consent; all outbound must follow TCPA, CAN-SPAM, Do-Not-Call, and applicable NAIC and state suitability rules.