Wealthmonitor

ION ANALYTICS

Data sheet

# Identify new prospects the moment wealth is created

Wealthmonitor identifies and tracks high-net-worth individuals (HNWIs) as they emerge from global M&A liquidity events. By connecting intelligence and deals to shareholder profiles, it enables wealth managers, private bankers, and fund managers  to identify, qualify, and engage new clients before competitors do.

## Who we serve

### Universal and private banks

Identify newly wealthy individuals, prioritize outreach, and expand existing client relationships.

### Private fund managers

Expand LP origination pipelines by targeting newly liquid founders, executives, and family offices aligned to fund strategies.

### Institutional investors / LPs

Map new wealth to sector theses or philanthropic goals, uncovering emerging allocators and donors.

## The client origination challenge

In today's highly active private capital markets, client origination depends on insight, timing, and precision. Yet most prospecting tools rely on static data — long after wealth has already been deployed.

Private banks, wealth managers, and private fund managers need to know who is **coming into liquidity**, when, and why — with the **right context**, and **before anyone else does**.

Without real-time visibility into these events, relationship teams miss opportunities to start conversations early, losing valuable share of wallet to faster-moving competitors.

### Professionals need a single platform that:

- Identifies new prospects coming to wealth before transactions close.
- Qualifies prospects with verified biographical and professional insight.
- Enables personalized engagement, backed by credible data.

# Our business development solution

Wealthmonitor delivers competitive advantages by linking individual profiles directly to M&A-driven liquidity events.

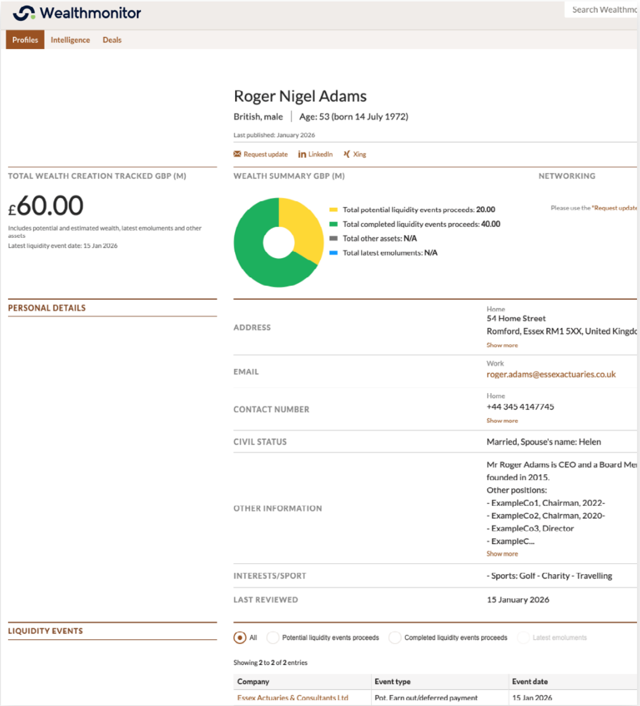
It equips business development and relationship teams with necessary intelligence to move early, prioritize outreach, and tailor engagement strategies with confidence.

## The platform delivers:

**Profiles**
Detailed biographical and professional data on HNWIs tied to real transactions.

**Intelligence**
Real-time alerts-based editorial insights on incoming and completed liquidity events.

**Deals**
Decades of verified liquidity events searchable by sector, geography, and deal size.




**Access early wealth signals and rich contextual profiling**

# Key benefits

**Identify new wealth early**
Spot liquidity events as they happen to act ahead of the market.

**Engage credibly**
Use verified background and deal intelligence to start stronger client conversations.

**Prioritize with precision**
Focus on individuals and entities most relevant to your client strategy.

**Expand relationships**
Surface liquidity triggers among existing contacts to identify  new opportunities.

# Part of the ION ecosystem

Wealthmonitor bridges ION Analytics' corporate and private market coverage, building on Mergermarket's global intelligence coverage and deals data, providing actionable private-wealth insight into the individuals behind liquidity events.

Website

Contact us

## About Wealthmonitor

Wealthmonitor transforms M&A intelligence into opportunity by connecting liquidity events to verified profiles of HNWIs and family offices. Our data and insights help financial institutions and fundraising professionals identify and engage new wealth creation opportunities with speed and precision.

Wealthmonitor is a service of ION Analytics. Together, we deliver predictive intelligence across global capital markets, combining human insight and analytics to reveal the opportunities others miss.