



WealthView for Financial Services

Navigating UK wealth:
Data-driven insights for
targeted growth



Introducing our latest wealth insight focused on the UK's wealth landscape. WealthView has been created for wealth management firms looking to make well-informed decisions and uncover growth potential.

Despite recent economic headwinds, one area of growth in the financial services sector has been that of the wealth market, both in population and financial value. However, with the backdrop of ever changing financial fortunes, one of the key challenges faced today by wealth managers, is the in-depth and latest understanding of consumer income and assets, especially with the latter often spread across multiple investment plans.

To help better understand your customers and the wider market, Experia has launched WealthView with the latest market information, providing you with insights on consumers income, liquid assets and financial attitudes.

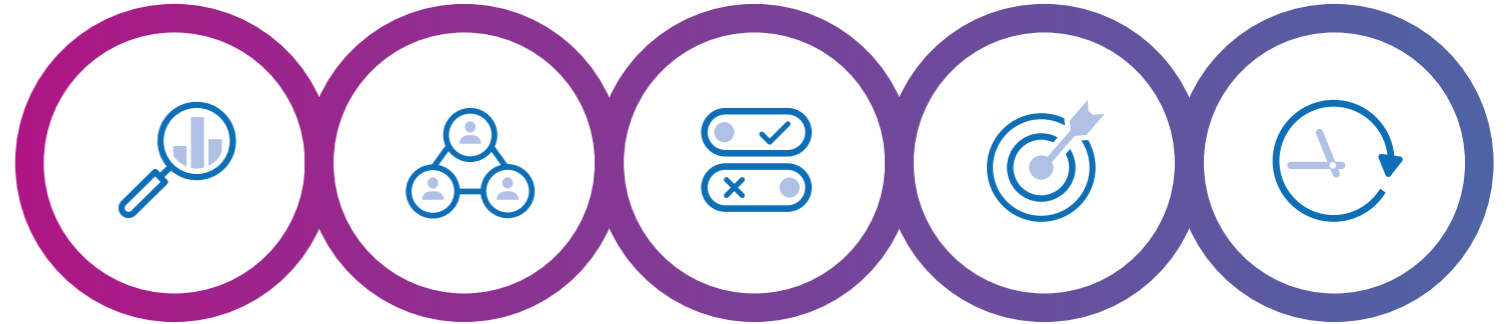
Our insight can be viewed through intuitive visualisation tools, appended to existing customers for better portfolio understanding or indeed tailored to your acquisition needs through multi channel marketing options.



Key features

- ✓ Comprehensive UK wealth insight
- ✓ Liquid asset banding from £30k to £2m plus
- ✓ Detailed demographic breakdowns
- ✓ Income data and distribution
- ✓ Financial attitudes
- ✓ Packaged insight dashboard solution
- ✓ Ability to activate insights in prospect direct mail and digital campaigns
- ✓ Potential to build insight into bespoke analytical solutions such as lead scoring if required

Benefits



Size and identify untapped markets:
Gain insights in to the UK asset and income distribution

Optimise Headroom:
understand and grow your share of customers wealth

Tailor services and offerings: understand consumer attitudes for more relevant communications

Optimise marketing: focus your campaigns through traditional, online or geo locational channels

Enhance competitive edge: make informed strategic decisions and stay ahead of competitors

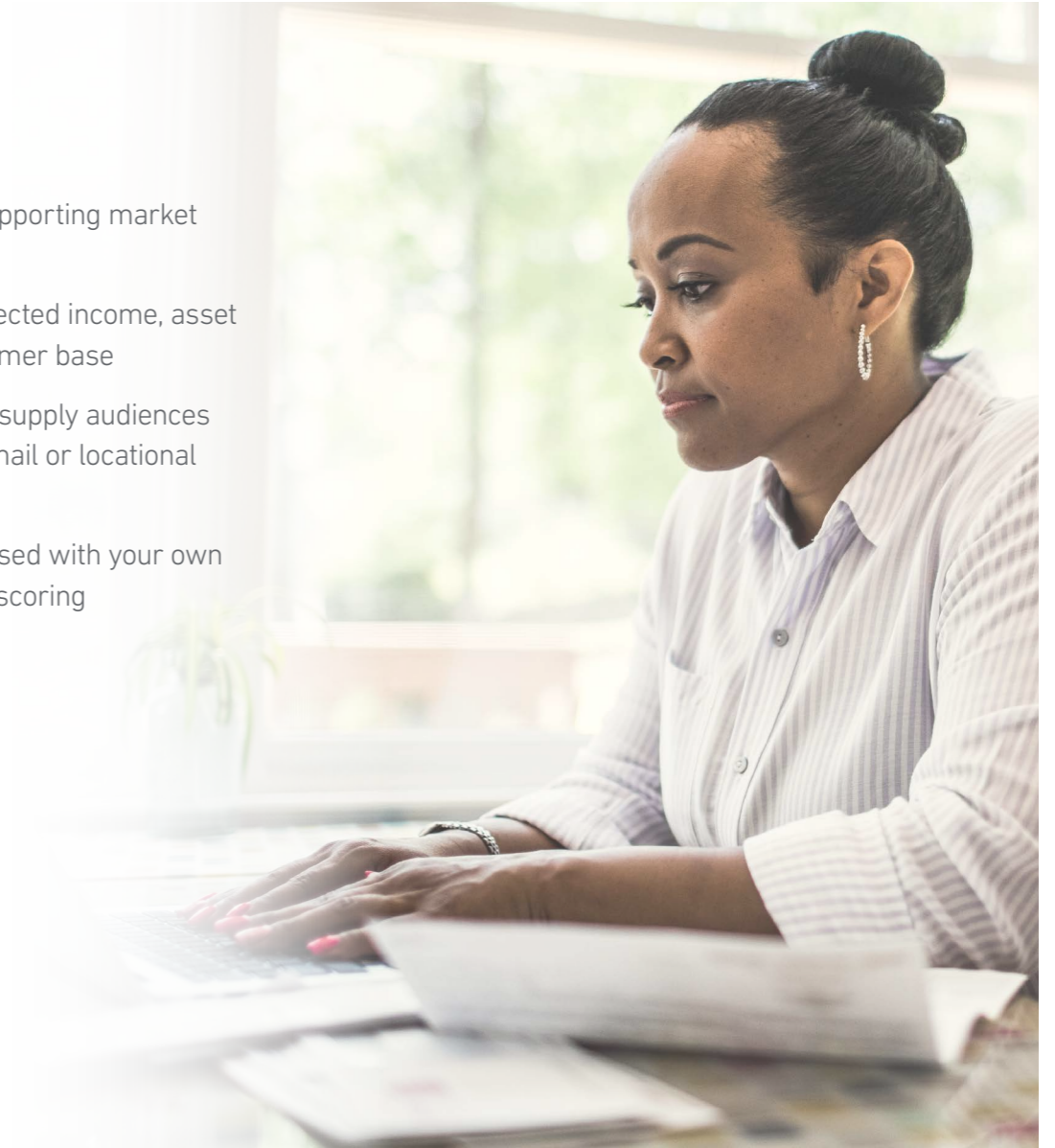
Technical specifications

- **Data sources:** Experian ConsumerView, Third Party Data which includes Government HMRC data and Office for National Statistics (ONS) financial surveys
- **Experian Proprietary Models:** Matching person and household (HH) to income and asset market statistics
- **Update frequency:** Income and liquid asset model refreshed annually dependent on contract renewal
- **Dashboard delivery:** Web-based, accessible on desktop and mobile devices

WealthView options

Ways you can utilise WealthView insights:

- **Market Sizing:** visualisation tool with supporting market size and behaviour documentation
- **Customer Headroom:** append all or selected income, asset and segmentation models to your customer base
- **Campaign based pricing:** Experian can supply audiences to target within digital channels, direct mail or locational targeting
- **Customised:** visualisation tools customised with your own first party data including lead or model scoring



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