

CATCHLIGHT

YOUR LEADS

INSIGHTS

INTEGRATIONS

FAQS

88

/100

Christopher Lee

Research complete | Last updated today

📄

⋮

Active lead

⚡ Hot

☀️ Warm

❄️ Cold

🏠 Age range: 61-65

💼 Executive

✉️ chris_t_lee@example.com

📞 500-867-5309

📘

🌐

🐦

🌈

+ Show more

Estimated Household Details

\$1m-\$3.5m

Investable Assets

\$250k+

Income Range

Saver

Spending Behavior

\$2m - \$5m

Estimated Home Value

High

Predicted investment expertise

\$34k-\$66k

Projected Client Revenue ⓘ

Family and Connections

0

Children in home

3

Grandchildren

Strong

Social Capital Score

Financial Interests & Life Events

Household hobbies

Matching segments

🎓 Highly Educated

👨‍💼 Professional

👤🕒 Pre-retiree

+ Add more

Financial Interests & Behaviors

📄 Estate Planning

💰 Charitable Giving

+ Add more

Possible Life Events

📄🏆 Received Company Stock

🌴 1-2 Years from Retirement

+ Add more

Engage Now

CATCHLIGHT

CONTACT

hello@catchlight.ai

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Projected Client Revenue is an estimate for the RIA revenue that an advisor may earn over the lifetime of a specific lead if they become a client. Several data points and assumptions go into this calculation. Revenue is calculated for each year from current age to life expectancy (max age 88), and then aggregated. The RIA revenue for each year is derived from an approximated advisory fee formula with estimated assets under management (AUM). The prior year informs the following year such that each year's AUM is approximated based on the previous year's AUM, the lead's estimated annual savings, projected asset growth based on an assumed rate of return (7.5% equity and 3.75% fixed income average annual returns within a hypothetical portfolio that is increasingly allocated toward fixed income assets as the lead nears or passes retirement age), projected asset drawdowns and estimated RIA fees. Annual savings are calculated based on the lead's estimated income and estimated savings rate. Asset drawdown after retirement for each lead is derived through proprietary assumptions.

Assumptions include static advisor fee schedule and no income after retirement. No tax impact is taken into account. Within the calculation, default values may be used to supplement data-driven estimates for income, investable assets and savings rates. The default values for income and investable asset are derived using data from the Bureau of Labor Statistics along with internal Catchlight data. The default savings rates are estimated from observing historical FRED personal savings rates (PSAVERT).

The Projected Client Revenue is intended to help advisors prioritize leads. It is not intended to predict actual future RIA revenue for one or more leads.

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