

ACXIOM

Prospect Enrichment **Proposal**

PREPARED EXCLUSIVELY FOR PROBITY ADVISORS · MAY 2026



ACXIOM

We put **data** to work.

Acxiom solves your most difficult challenges — so brands can realize the greatest value from data and technology.



CHASE

citi

TransUnion

Southwest



L'ORÉAL

Mutual of Omaha

TRUSTED BY THE WORLD'S MOST DATA-DRIVEN BRANDS

THE SYMPTOM

\$25M Media Budget with Diminishing Returns

Across Probity's paid channels, customer acquisition costs are rising and engagement is falling. Growing the managed portfolio is getting more expensive.

\$25M

ANNUAL MEDIA SPEND

↑ 9%

COST PER ACQUISITION (YOY)

↓ 11%

CLICK TO LEAD (YOY)

↓ 14%

LEAD-TO-APPOINTMENT (YOY)

THE PROBLEM

Broad targeting and messaging does not drive today's consumer to action

No two customers are alike. Lacking appropriate context of a consumer's situation leads to inefficient targeting and messaging that does not resonate.

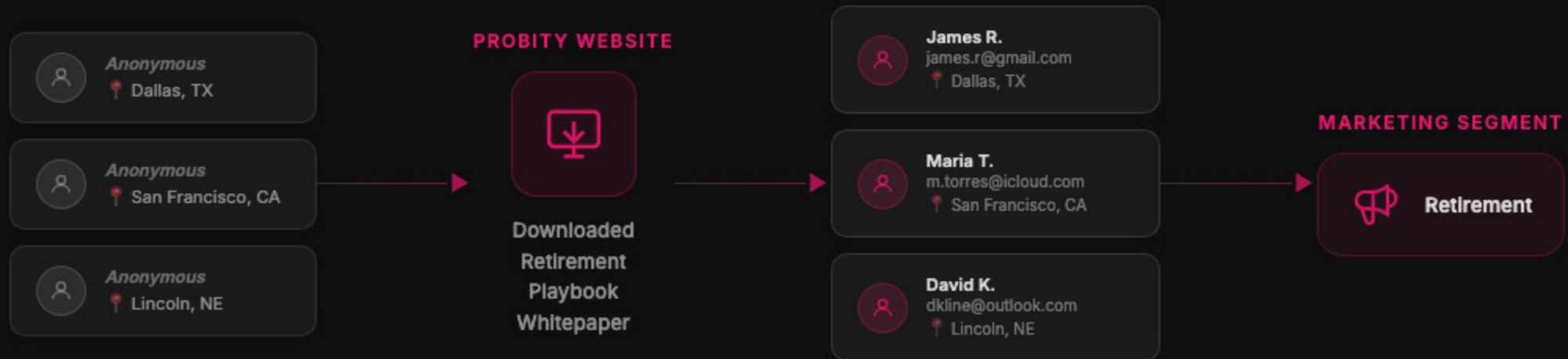
66%

of consumers are **more likely to buy** from a brand that treats them as an **individual**

CURRENT STATE

Right Prospect + Wrong Message = Low Conversion

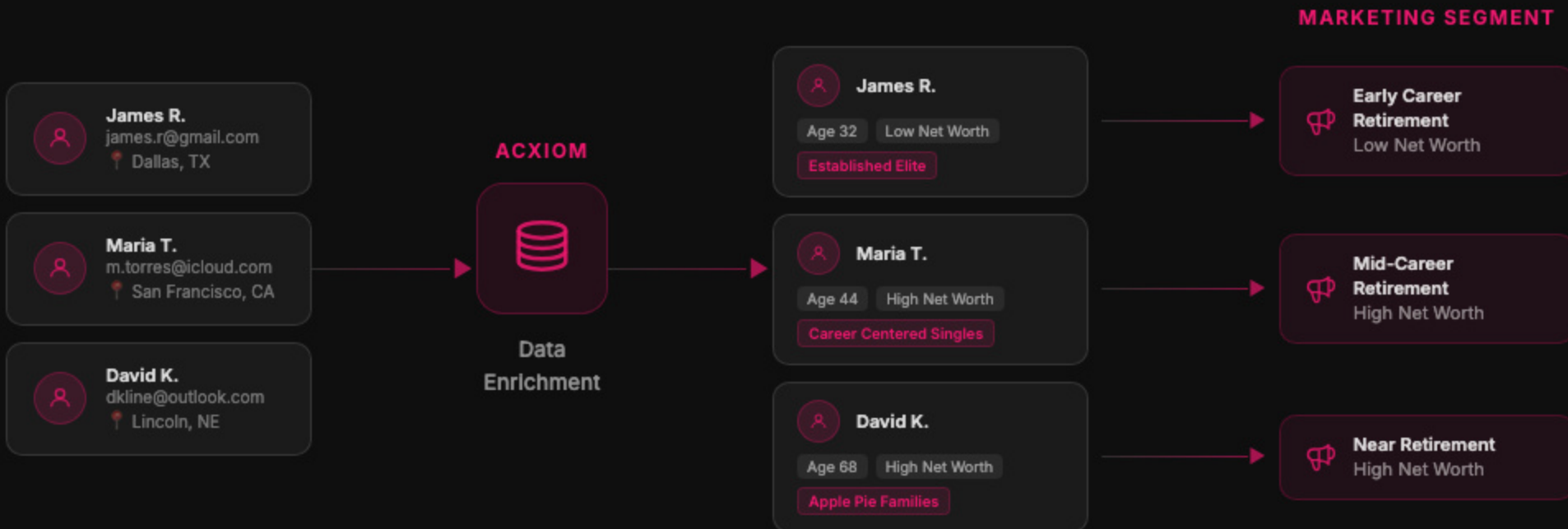
Building trust takes time. Before a prospect schedules a call, they need to feel comfortable that Probity can fulfill their needs. Today, the 33-year old future planner will get the same follow-up treatment as a 66-year old with \$10M in their retirement account.



ENRICHED STATE

Right Prospect + Right Message = High Conversion

With Acxiom's **InfoBase®** attributes and **Personicx®** consumer segments appended, it's now possible to speak to their needs directly. And that messaging personalization will drive higher engagement and increase conversion.



THE SOLUTION

Acxiom Data Unlocks Your Prospect's True Identity

Acxiom InfoBase® delivers accurate and powerful third-party descriptive and touch point data to nearly all addressable U.S. consumers. This single source provides comprehensive insights with more than 1,500 attributes for U.S. people and households.



FINANCIAL PROFILE

- Estimated income & net worth
- Investable assets range
- Credit & debt indicators



RETIREMENT & LIFE STAGE

- Retirement proximity score
- Life stage & age band
- Pension & 401(k) signals



FAMILY & HOUSEHOLD

- Household composition
- Marital status & dependents
- Home ownership & value



WEALTH EVENT SIGNALS

- Property & real estate activity
- Inheritance & windfall signals
- Business ownership events



FINANCIAL ACCOUNT ACTIVITY

- Investment account indicators
- Banking & brokerage signals
- Insurance product holdings



DIGITAL & BEHAVIORAL SIGNALS

- Online financial interest signals
- Email & channel reachability
- Purchase propensity scores

THE EXECUTION

Turnkey solution implementation by a Salesforce trusted partner

Our solutions are highly integrated in both Sales and Data clouds. Our Salesforce experts have implemented similar enterprise-grade solutions for some of the biggest consumer brands in the world.



InfoBase®

Acxiom will append **over 50 data attributes** to every prospect in real time via Salesforce Data Cloud connectors, using industry-best enrichment practices to make sure your data accuracy is world-class.



Real ID™

Acxiom will append Real ID to every prospect in real time via Salesforce Data Cloud connectors, generating up to **1.7x greater reach** of first-party data on top DSPs and **150% higher attribution** of conversions to paid media.



Salesforce Integration

Acxiom will set up and configure data enrichment features on Salesforce Sales and Data clouds, **unlocking messaging personalization** opportunities in the customer experience.



Custom Audience

Acxiom will build up to **10 custom audiences** for Probity based on propensity-driven insights from first and third-party indicators to drive stronger prospect targeting across paid media channels.

THE RESULT

20% CAC Reduction. 6 Month Payback.

Acxiom data enrichment has brought our clients an average ad spend efficiency improvement of 20%. At Probity's annual \$25M historic ad spend, this engagement would save **\$5M per year** with a **6 month investment payback**.

AD SPEND EFFICIENCY

| | |
|----------------------------|--------------|
| Annual Ad Spend (Historic) | \$25,000,000 |
|----------------------------|--------------|

| | |
|------------------------|-----|
| Efficiency Improvement | 20% |
|------------------------|-----|

| | |
|---------------------------------|--------------------|
| Estimated Annual Savings | \$5,000,000 |
|---------------------------------|--------------------|

PAYBACK CALCULATION

| | |
|---------------------------|--------------|
| Implementation Investment | ~\$2,500,000 |
|---------------------------|--------------|

| | |
|-----------------|-----------|
| Monthly Savings | \$416,667 |
|-----------------|-----------|

| | |
|-----------------------|-----------------|
| Payback Period | 6 months |
|-----------------------|-----------------|

THE PATH FORWARD

From signed agreement to live enriched audiences in **30 days**

Days 1–14

Data Audit & Match Assessment

- Map Probit CRM fields to InfoBase® attributes
- Run initial match rate analysis (no charge)
- Identify top enrichment signals for ICP
- Define suppression list parameters



Days 15–30

Enrichment & Identity Resolution

- Full InfoBase® enrichment via AbiliTec
- Identity resolution across email, phone, address
- Segment build: HNW, pre-retirement, wealth event
- Audience push to Salesforce Data Cloud



Days 31–90

Activation & Measurement

- Live enriched audiences on LinkedIn, Google, Meta
- A/B test: enriched vs. prior targeting
- Look-alike model launch from best converters
- 30-day CAC comparison vs. baseline

Acxiom

Probity

We're excited to **get started**



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