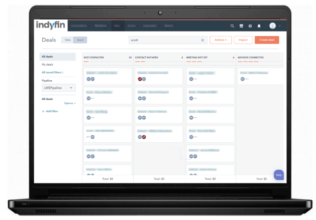
NEWS
For Immediate Release



Media Contact:
Jonny Swift
Impact Communications, Inc.
913-649-5009
JonnySwift@ImpactCommunications.org

Indyfin, a Unique Growth Solution for Financial Advisors, Launches in Texas

New prospecting technology provides introductions with no upfront costs; advisors pay only when prospects become clients

San Diego, CA, February 18, 2020 (PR NEWSWIRE) – Indyfin, a new prospecting and growth solution for financial advisors, recently launched in Texas. Indyfin takes the risk out of sourcing leads for financial advisors by providing them with introductions; there is no cost to the advisor until the prospect becomes a client. By using their groundbreaking technology and proven approach, Indyfin translates leads into “live” phone introductions and in-person meetings.

“Indyfin is redefining how the wealth management industry connects with future clients,” said founder and CEO, Akshay Singh. “Unlike traditional lead-gen services, we don’t charge you for leads. Financial advisors who use the platform start receiving customer leads from the best possible sources at no cost immediately upon joining the Indyfin family, and don’t pay for introductions until they actually become clients – meaning no upfront risk for advisors.”

Indyfin CEO Akshay Singh is at the 2020 T3 Technology Tools for Today Advisor Conference, being held February 17-20 in San Diego. To request an in-person meeting send an email to JonnySwift@ImpactCommunications.org or ask the T3 Registration Desk personnel for Swift’s mobile phone number.

To watch a video of Singh talking about Indyfin while at the T3 Conference, click here.

INDYFIN TURNS ONLINE LEADS INTO NEW CLIENTS

Indyfin empowers financial advisors and wealth management firms – allowing them to spend their time doing what they do best – while taking the time, stress and guesswork out of converting leads into signed clients. With the help of Indyfin, advisors can spend time building their businesses and serving their clients, rather than wasting time and money in buying and pursuing unresponsive leads.

“Wealth managers are relationship and investment experts,” said Singh. “Indyfin can help them crack the code when it comes to creating a funnel of new business inquiries. Our service turns online leads into signed clients.”

Advisors using Indyfin no longer have to track down individuals to set up a meeting. Online connections can be finicky and following up with them is an exhausting process if done correctly. Only the largest firms with big call centers have the resources to follow up like Indyfin does. Also, when advisors buy leads online, they often end up wasting money and time on leads that are not well-suited for becoming their clients. The Indyfin proprietary technology ensures that the right prospect is matched with the right advisor, making the process of converting them into clients easy from the get go. With Indyfin, advisors can focus on serving their clients while Indyfin handles matching the right prospects to the advisor, calling prospects and, by using some of the best conversion technology available today, getting high-quality prospective clients in front of the advisor.

Indyfin generates opportunities from various Internet sources and then pre-screens and connects with each prospective client over the phone. Indyfin matches the incoming leads to the advisor best suited to service that prospective client, and eliminates the cost and frustration of buying irrelevant leads. When the individual is ready, Indyfin will either connect them live, in real time, with the financial advisor for a quick introduction or help to setup an in-person meeting. Indyfin uses all communication tools to effectively communicate with financial advisors – mobile phone calls, text messages, and emails – to ensure advisor availability. Indyfin even provides additional insights into attributes such as personality traits, life situation, and other pertinent information gathered from publicly available sources, to help the advisor connect better with the prospect in the first meeting.

ABOUT INDYFIN

Indyfin is a new prospecting and growth solution for financial advisors based in Dallas, Texas. As former investment professionals, they too were frustrated by all the wasted time and money spent on leads that were not a good fit to start with, and even if the lead was good, the many follow-ups needed to get a potential customer on the phone. They knew there had to be a better way. As a Registered Investment Advisor, Indyfin is focused on compliance and aligned with other advisors’ business objectives. While the Indyfin processes and technology helps to convert leads into real connections, they understand that no two people are alike – which is why Indyfin adds a human touch through Live Conversation to personalize the experience of connecting prospective clients to advisors. If that initial meeting doesn’t yield results, Indyfin keeps the conversation going and provides another opportunity or they will offer insights as to why the next step in the connection process will not materialize. Learn more at www.Indyfin.com.