



# ExecAtlas + SS&C Tier1 CRM

## ExecAtlas keeps your CRM accurate and reveals the warm paths to any target executive

**ExecAtlas** is a tool that delivers verified executive data from SEC filings and public records: work histories, board memberships, and relationship networks across 4M+ executives and 600M+ connections, directly into Tier1 CRM. Data updates automatically as executives change roles keeping your Tier1 CRM data up to date.

### Why Use ExecAtlas With Tier1?

Tier1 manages client relationships and assets. ExecAtlas shows who in your firm can reach the executives you're targeting.

#### Together:

- Executive profiles stay current automatically. No stale contacts.
- Relationship paths appear across your entire firm, not just your book.
- When a target executive moves, you know which banker worked with them before.

### What ExecAtlas Enables in Tier1



**Automatic profile updates.** Role changes, board appointments, and company moves sync to Tier1 in real time.



**Cross-firm connections.** See which advisors and bankers share past employers, boards, or work history with target executives. Warm paths appear in Tier1.



**Coverage gaps.** Identify client executives where you lack relationships, plus colleagues who can make introductions.



**Executive transition alerts.** Get notified when executives change roles. Act before competitors.



**Board network visibility.** Map board memberships to find indirect access through colleagues.

**The Result:** Reach decision-makers faster. Defend relationships. Win mandates through warm introductions, not cold outreach.

**Ready to see ExecAtlas + Tier1 in action?** Contact us today. [www.tier1fin.com/contact-us](http://www.tier1fin.com/contact-us)