

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