

The Wealth Manager's Edge:

Anticipate Wealth and Grow AUM with Predictive Intelligence

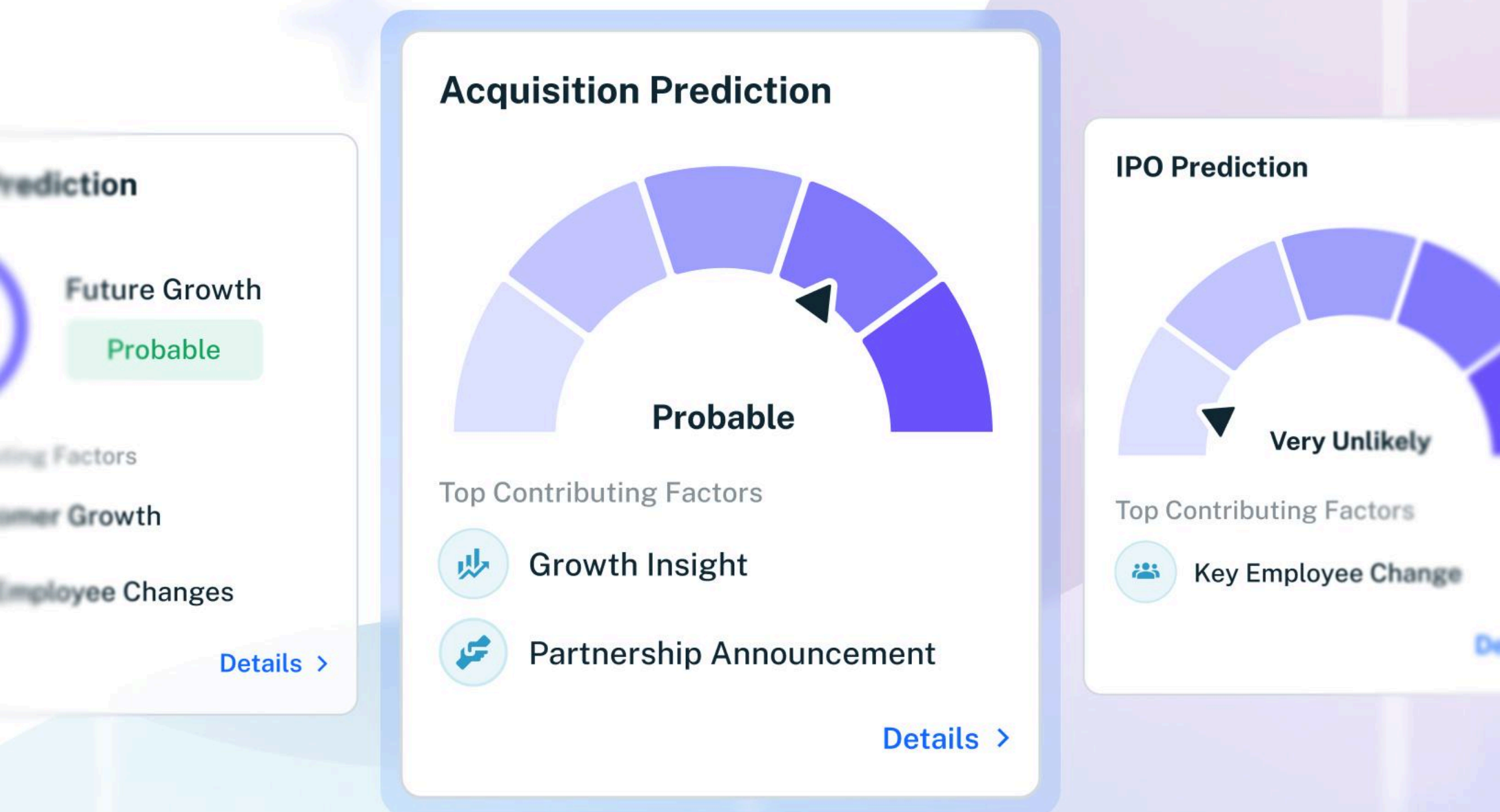


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Introduction

Winning in wealth management means excelling at two things: finding the right high-net-worth relationships and delivering exceptional, future-focused advice that grows those relationships over time. Both require the ability to anticipate change in the market before others see it coming.

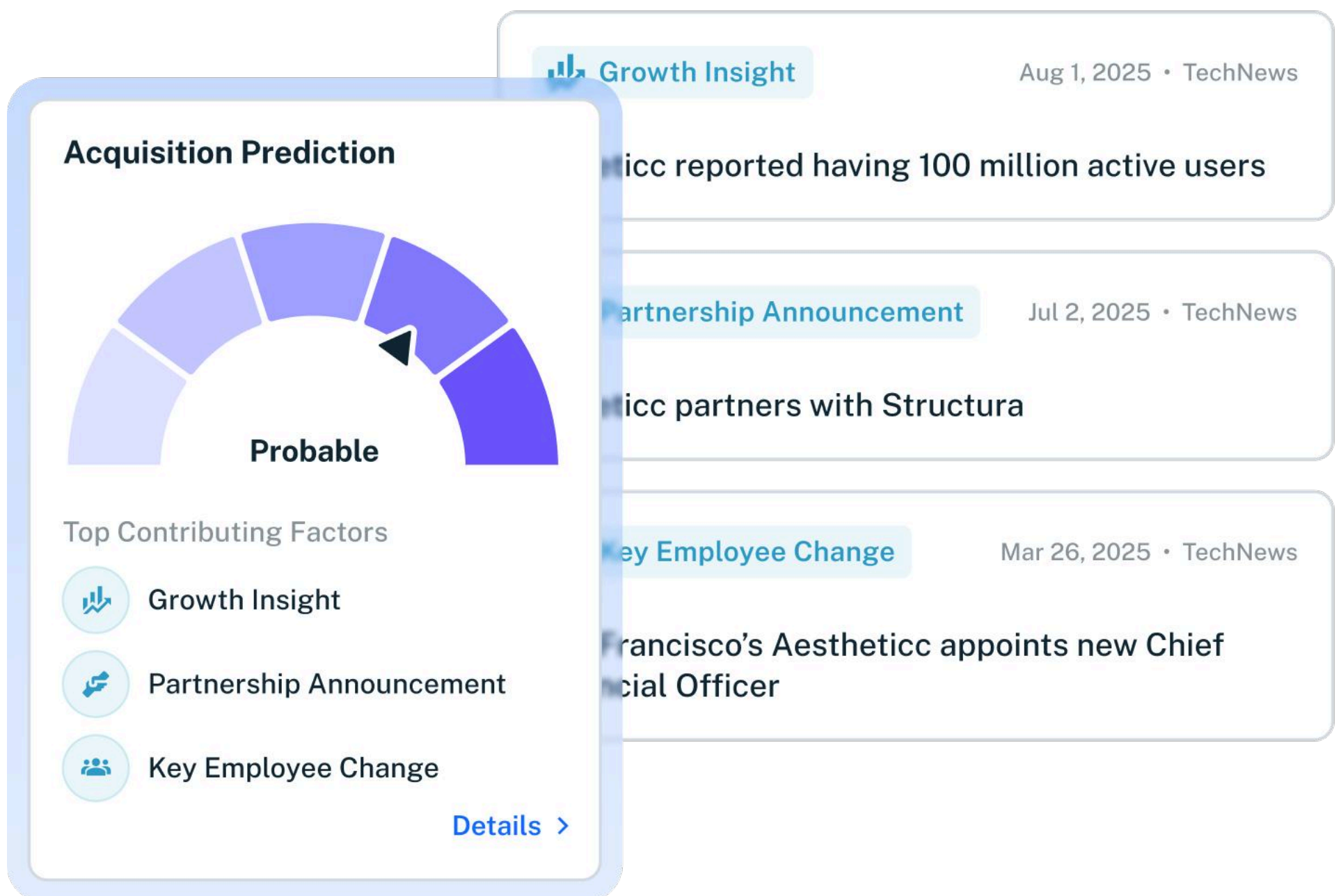
But here's the challenge: for most firms, information about private market movements is fragmented, delayed, or incomplete — making it difficult to know where to focus prospecting efforts or how to proactively guide existing clients.

Crunchbase's predictive intelligence changes that.

By combining proprietary private market data, AI-powered analysis, and usage insights from 80M+ users, Crunchbase delivers forecasts on funding, growth, IPOs, acquisitions, and closures. This empowers wealth managers to identify and engage promising prospects earlier, strengthen portfolio strategies for current clients, and mitigate risks before they materialize.

In this guide, you'll see how predictive intelligence can help you both source high-value relationships and deliver the timely, tailored strategies that deepen trust, drive portfolio performance, and keep you ahead of the market.

Notable Events



How to Win High-Net-Worth Relationships and Advise Smarter with Predictive Intelligence

Whether you're reaching out to a prospective client or managing an existing client's portfolio, you need to anticipate market shifts — not just react to them after the fact. By the time an IPO is announced or a funding round hits the news, the competition has flooded in and your window has closed.

Predictive intelligence enables you to move first, acting on early signals of wealth creation, market momentum, or potential risk — giving you the foresight to win new business and deliver exceptional advisory value. Let's dive into the benefits of predictive intelligence in more detail:

1. Find Your Next High-Net-Worth Relationship

Desirable, high-net-worth clients are difficult to find and win. In order to build these relationships, you need your foot in the door first.

Crunchbase's predictive intelligence surfaces early indicators — such as upcoming funding rounds, IPOs, or acquisitions — that point to individuals or companies on the cusp of major wealth events. By identifying these opportunities before they're widely known, you can reach out early, build rapport, and position yourself as the trusted advisor before competitors appear.

2. Strengthen Portfolio Advice and Reduce Risk

For current clients, private company predictions reveal both growth opportunities and early warning signs. By anticipating sectors or companies that are poised for expansion, you can deploy capital more strategically. You'll also be able to spot risks — such as layoffs, leadership turnover, or slowing growth — early enough to rebalance portfolios and protect value.

3. Accelerate Due Diligence With Confidence

Whether reaching out to prospective clients or managing their portfolios, you need to act quickly and with confidence. Instead of spending hours digging for obscure signals or piecing together fragmented data, you can get a centralized, forward-looking view of market activity with Crunchbase's predictive intelligence. This means better-timed outreach, stronger portfolio strategies, and more impactful client conversations.

Get the Full Suite of Predictions with the Crunchbase API

The Crunchbase API is the only solution that delivers end-to-end private market predictions — covering every major event from funding to exits, including acquisitions, IPOs, growth, layoffs, and closures. This helps you engage high-net-worth clients earlier, advise smarter, and grow assets under management.

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A Closer Look At Crunchbase's Predictions

As previously mentioned, predictive intelligence gives you an advantage on two fronts: engaging potential clients before wealth events occur and delivering portfolio guidance that accounts for what's likely to happen next. Here's a closer look at just some of the predictions you get with Crunchbase:



Exit Prediction Model

Major liquidity events like IPOs and acquisitions can create or impact substantial wealth. Crunchbase's IPO and Acquisition Predictions flag companies most likely to experience these outcomes, helping you identify emerging high-net-worth prospects early and adjust client holdings to capture upside.



Funding Prediction Model

Capital raises often signal new wealth creation, business expansion, and shifting investment strategies. The Funding Prediction model forecasts if and when a company will raise its next round, allowing you to time outreach to new prospects and prepare client portfolios for the ripple effects.



Growth Prediction Model

Forecasts about companies poised for near-term expansion can also point you to where the money is. With Crunchbase's Growth Prediction model, you can identify where momentum is building — whether that's a prospect's business showing signs of rapid growth or a sector that aligns with a client's investment goals.



Closure Prediction Model

Business closures can signal significant financial instability and market shifts. The Closure Prediction model detects these risks early, enabling you to act quickly to protect client portfolios from exposure to vulnerable companies.

Grow AUM with Trusted Company Predictions

Crunchbase Predictions are built on the only combination of live, trusted, proprietary private company data, AI-powered analysis, and aggregated usage data from over 80 million active users — giving you forecasts that are both actionable and reliable so you engage earlier, advise smarter, and consistently stay ahead of the market.

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Add Predictive Company Intelligence To Your Own Models And Tools

Crunchbase Predictions can be accessed using **Crunchbase Business**, or by embedding them into your own models, tools, and workflows, including exclusive predictions only available with the **Crunchbase API**.

Here's a bit more about what you can accomplish with the Crunchbase API:



Strengthen Prospecting and Advisory Models

Incorporate Crunchbase's trusted predictions — including funding, growth, exit, and risk indicators — into your internal models. Use them to pinpoint when to reach out to a promising prospect or to evaluate how an anticipated market shift could affect a client's portfolio.



Accelerate Relationship and Portfolio Monitoring

Refresh your pipeline and portfolio views with continually updated company data and forecasts directly in your team's existing models and tools. Whether you're tracking potential clients through major business milestones or monitoring holdings for signs of momentum or instability, your entire team will always have the latest intelligence to act on.



Reduce Research Friction

Skip the time-consuming task of piecing together fragmented information. With live, continually refreshed data and predictions across your tech stack, your team can quickly prepare for prospect meetings or client reviews armed with accurate, data-driven foresight.

By integrating the Crunchbase API into your CRM, portfolio management system, or analytical tools, you can move faster, act earlier, and consistently deliver value. **[Learn more](#)** about how wealth managers benefit from predictive intelligence.

Already Using the Crunchbase Software?

The API gives you access to premium Predictions and unpublished data not available anywhere else. It's the fastest way to scale trusted intelligence across your systems, automate action, and power smarter business decisions.

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Predictive Company Intelligence You Can Trust

When you base prospecting and portfolio decisions on predictive intelligence, accuracy is non-negotiable. Crunchbase's models are built on a unique combination of proprietary private market data, AI-powered analysis, and real-time activity data from 80M+ users — delivering a reliable view of the market's next moves.

This intelligence draws from thousands of data partnerships, government filings, direct input from industry insiders, and aggregated platform activity. Every data point is cleaned, validated, and enhanced through advanced artificial intelligence models and human oversight, ensuring you can trust the signals you act on.

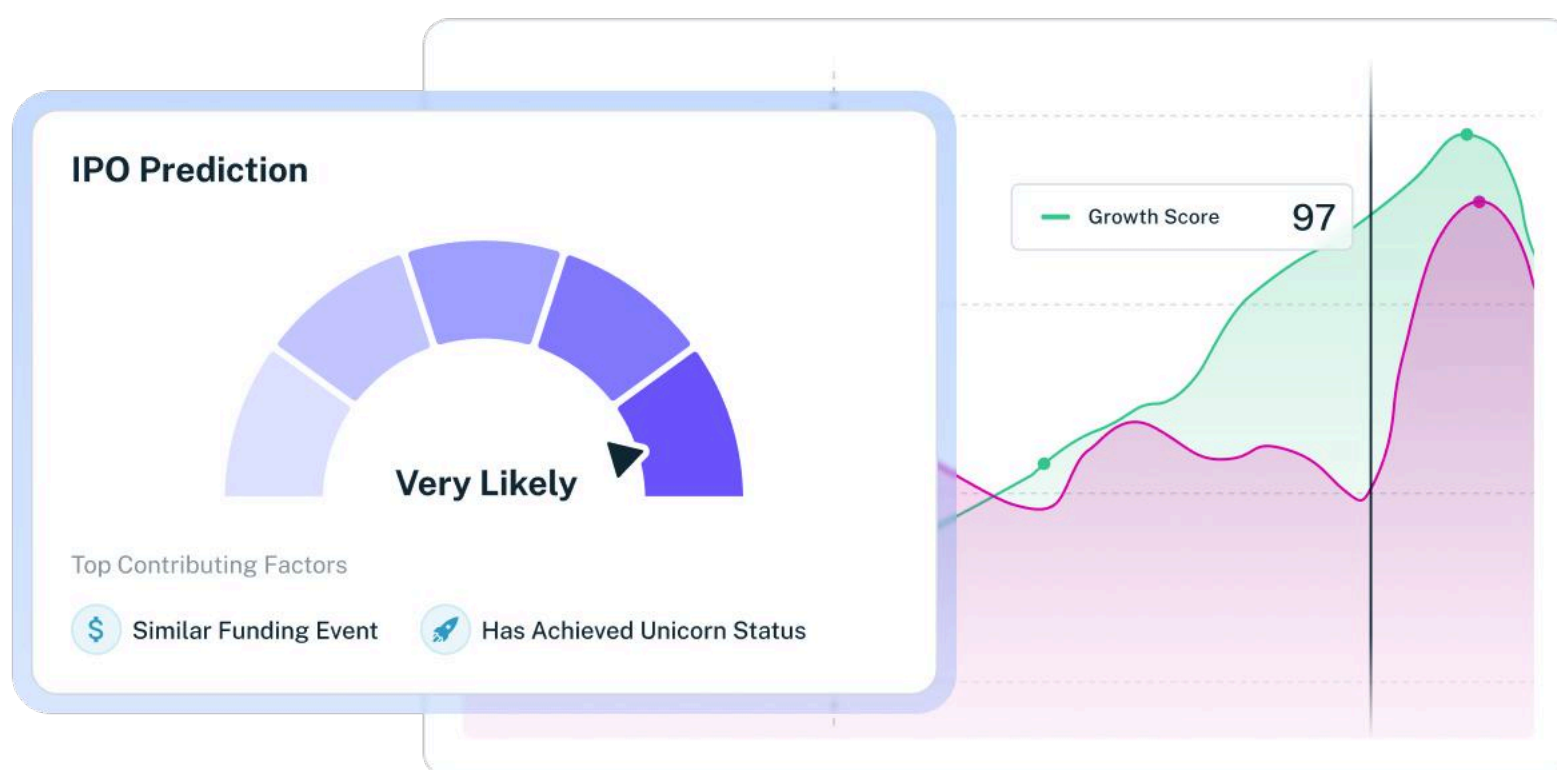
For wealth managers, this means winning high-net-worth prospects before competitors are aware of them, and making timely recommendations that help clients capture upside or avoid risk. Whether it's spotting a likely liquidity event, detecting early signs of instability in a portfolio holding, or pinpointing sectors on the rise, you have a foundation of intelligence that supports both relationship growth and long-term wealth preservation.

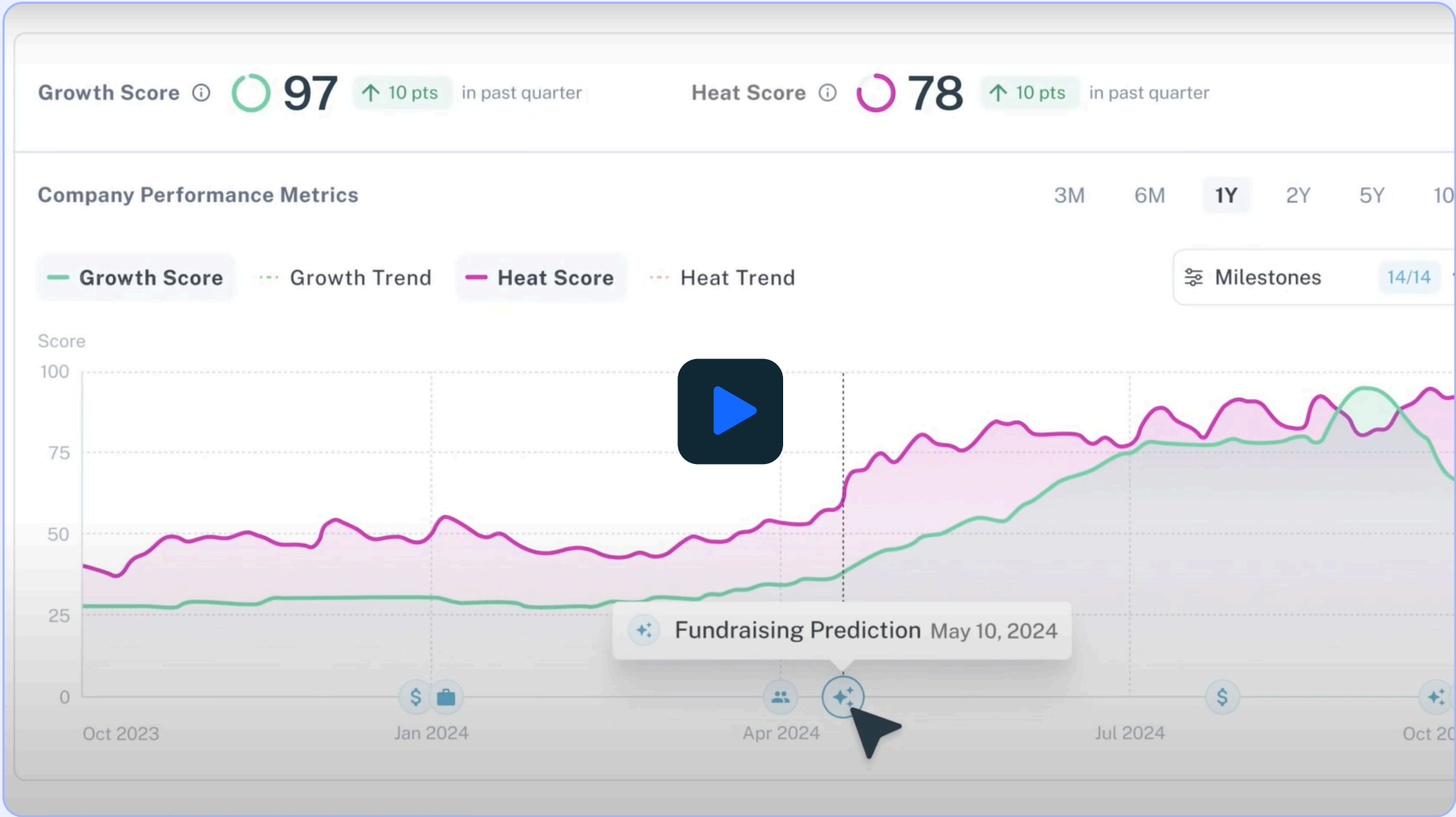
In a market that rewards foresight, predictive intelligence isn't just an advantage — it's essential to consistently winning new business and delivering the high-quality advice clients expect.

“Crunchbase has always been a trusted source for hard-to-find, high-quality data on private companies, but the predictive engine they've built is game-changing. Having accurate, predictive insights that let my teams act before any of the competition? That's indispensable.”

Todd Olson

CEO and co-founder of Pendo





About Crunchbase

Crunchbase is a predictive intelligence solution that forecasts private market movements using a unique combination of live private company data, AI-powered analysis, and aggregated usage data from 80M+ users.

It helps wealth managers, investors, and advisors be the first to find and act on private market opportunities — from identifying high-net-worth prospects ahead of liquidity events to advising clients on emerging risks and growth trends.

Contact us to access predictive intelligence with Crunchbase.

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crunchbase