



Convergence Advisers Likely to Launch New Funds (LTL)

Predictive adviser intelligence before fund formation signals appear
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Product Description

- **Likely to Launch** identifies investment advisers that are statistically more likely to launch a new private fund. The model demonstrates a 75% accuracy rate and combines successful fund detection, predictive launch characteristics, and adviser business intelligence to help clients build a pre-formation pipeline before entity formation or Form D signals become visible.

Product Benefits

- **Creates a First-Mover Advantage:** helps clients begin adviser conversations before broader market evidence confirms a new fund launch.
- **Improves Sales Prioritization:** focuses business development and campaign coverage on advisers with stronger objective launch characteristics.
- **Frames the Market Opportunity:** the source materials project 71,000 new private funds from 2026 through 2030, with \$4.0 trillion in assets under administration and approximately \$4.7 billion in administration fees.

Product Features

- **Successful Fund Detection:** identifies successful funds across 450,000 Knowledge Center fund records using robotic process automation and business rules.
- **Predictive Launch Analytics:** detects adviser characteristics associated with future fund launches using Convergence predictive models.
- **Sales-Ready Adviser Intelligence:** provides prioritized adviser lists, launch context, and business intelligence for Knowledge Center and campaign workflows.

Primary Use Cases and Delivery

- **Primary Users:** fund administrator sales, marketing, strategy, relationship management, and sales operations teams.
- **Common Use Cases:** pre-formation pipeline development, campaign planning, adviser warming, territory coverage, and handoff to Early Detection Alerts.
- **Commercial Impact:** the source materials estimate that winning five funds at a minimum fee of \$65,000 per fund creates a 12.8x ROI.