



Real-Time Context for High-Stakes Finance Calls

From deal origination to month-end closes, Org IQ turns your firm's email into an always-on source of market, portfolio, and performance insights.

With every conversation captured, analyzed, and made instantly searchable, finance leaders can spot opportunities, surface risks, and act with confidence — no digging, no delays.

Connect the Dots Before the Numbers Hit the Books

Org IQ equips finance teams with intuitive, analytics-first tools to:

- ✓ **Spot performance shifts early** by detecting changes in client tone, advisor activity, or deal progress.
- ✓ **Uncover approval and disclosure bottlenecks** as they occur, so transactions clear faster.
- ✓ **Surface high-impact conversations** tied to revenue, churn, or funding momentum without combing through inboxes.
- ✓ **Map communication trends** across teams, portfolios, or geographies to guide strategy and staffing.

And much, much more

Why Org IQ?

So glad you asked. Over the past three years, Org IQ has:

Archived 50 million emails across the financial services sector

Delivered real-time communication and sentiment insights to finance teams managing billions in transactions



Helped firms spot early churn and funding risk weeks before red flags typically manifested themselves in reports

Maintained 94% client retention by replacing reactive audit seasons with proactive intelligence year round

But don't just take our word for it

"Org IQ transformed our approach to protected customer interactions. We can quickly access critical records, ensure compliance, and improve efficiency, all while reducing legal risks and providing better service to our clients."



Riley Feldman,
Managing Partner, Catalyst Financial Group LLC

Keep the whole financial picture at your fingertips.

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