dakota marketplace

Trusted by thousands of fundraising teams to access the data and intelligence they need.

ALL IN ONE PLATFORM.

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I. INTRODUCTION

The investment industry has historically lagged when it comes to adopting modern technology… especially in how data is managed and used. But in today's market, staying competitive means staying current. Firms that fail to leverage accurate, up-to-date data risk falling behind.

Today, 91% of companies with 10 or more employees use CRM technology to manage relationships and streamline workflows (source). CRM platforms have become a standard business tool across industries, reflecting how essential modern data systems are to competitive performance.

At Dakota, our investment sales team's CRM isn't just a tool. It's the backbone of our entire process. Every member of our team relies on it to drive outreach, track relationships, and uncover new opportunities. And it's also the database we sell today.

In this eBook, you'll learn why your firm's success depends on the quality of your data, why Dakota Marketplace is the most complete and trusted data platform in the market, and how to leverage its features to raise capital and stay ahead.

I. THE IMPORTANCE OF CLEAN, ACCURATE DATA

If your job is to book meetings and drive revenue, your database should be your most valuable asset. Not your biggest obstacle. But here's the truth: most databases are filled with stale, incomplete, or inaccurate data that wastes time and costs money.

64% of organizations say data quality is their top data integrity challenge, and 67% admit they don't fully trust their data for decision-making (source), highlighting how poor or outdated data continues to hinder performance across the industry.

The three core problems? Incomplete data. Inaccurate data. Outdated data.

Here's how we've seen this playout in real-world scenarios:

1. **Incomplete data:** You're heading to Boston for meetings. Your database shows 100 contacts, but there are 500+ real prospects. That's 80% of your market missing.
2. **Inaccurate data:** You call a contact who's no longer with the firm… or worse, never should've been on your list in the first place. Now you're backtracking instead of progressing.
3. **Outdated data:** Titles, emails, AUM, and locations are wrong – and there's no system in place to keep them current. Your team spends time chasing info instead of building relationships.

So why rely on a database at all?

Because you haven't used Dakota Marketplace.

In the next section, we'll show you how Dakota solves these data problems so you can focus on connecting with the right people and driving results.

III. WHY DAKOTA MARKETPLACE IS YOUR SOLUTION

Now that we've made it abundantly clear that data within your database needs to be accurate and up to date, we can dive into why Dakota Marketplace is your one stop shop to provide you data and insights that are complete, accurate and updated.

Marketplace is trusted by thousands of fundraising teams worldwide to raise capital, source deals, track peers, and access comprehensive, up-to-date intelligence. All in one centralized platform.

Our mission is to make the lives of fundraisers easier… whether you're managing relationships, sourcing opportunities, or deploying capital. That's why Dakota Marketplace is structured for speed and clarity, with intuitive search, metro-area navigation, and the ability to focus on the firms and people that matter most to you.

With that, let's get into what you'll have access to with your Dakota Marketplace membership.

OVERVIEW

Dakota Marketplace is a centralized database of Limited Partners (LPs), General Partners (GPs), Private Companies, and private fund performance and benchmarking, designed for professionals across fundraising and investment strategy.

With thousands of verified accounts and contacts, the platform gives you the ability to filter by firm type, strategy, AUM, geography, metro area, and decision-maker role so you can quickly build targeted outreach lists and uncover new opportunities.

Whether you're planning a trip and need to identify allocators in Chicago, or you're building a list of GPs in Dallas investing in venture, Marketplace helps you move faster and with more focus.

DATASETS

RIA Data

> ***The most complete and current view of 33,000+ RIAs, built for targeting the fastest-growing segment in the investment industry.***
>
> Dakota Marketplace delivers unmatched transparency into the RIA universe, helping you connect with the right firms, fast.

Here's what you get:

- **True RIA Classification:** Dakota separates verified wealth-management RIAs from GPs that happen to carry the same SEC registration as investment advisers, so your RIA list stays wealth advisors, not fund managers who were never going to take the call.
- **Verified RIA Profiles:** Access firm-level data segmented by AUM, geography, and structure (independent vs. BD-affiliated) to build and prioritize targeted prospect lists.
- **Decision-Maker Contacts:** Reach hard-to-find RIA executives and allocators with verified contact information, eliminating hours of manual research.

- **Capital Raising Intelligence:** Identify RIAs allocating to private markets, long-only, and hybrid vehicles, and prepare for meetings with detailed firm profiles.
- **Market & Trend Tracking:** Stay ahead of shifts in capital flows, investment preferences, and organizational changes across the RIA landscape.
- **Metro Area Searchability:** Zero in on firms by metro area or region to align outreach with your territory and uncover local opportunities.
- **Form ADF Filtering:** Filter RIAs by Form ADV data to understand how they manage client assets, structure investment offerings, and disclose business practices.

Family Office Data

> ***4,800+ verified family offices, updated in real time giving you unmatched visibility into one of the most opaque and high-impact segments of the allocator universe.***
>
> Family offices are where Dakota truly sets itself apart. Marketplace gives you the edge with curated, accurate data that's notoriously difficult to source elsewhere.

Here's what you get:

- **Target the Right Investors:** Pinpoint family offices actively allocating to private equity, credit, real estate, venture capital, and niche strategies like emerging markets or hybrids, as well as traditional long-only equity and fixed income mandates.
- **Advanced Filtering & Searchability:** Filter by geography, account type, AUM, and investment style plus access verified contacts and asset class preferences to build accurate prospect lists.
- **Curated List Building:** Quickly generate targeted lists by metro or region. Drill down by asset class focus or decision-maker role to find the most relevant opportunities.
- **Expand Allocator Coverage:** Layer family office data with RIAs, endowments, and foundations to get a complete picture of the allocator market and uncover whitespace others miss.

Financial Advisors

> ***270,000+ advisors in one clear view, organized and filtered to support your sales strategy, region by region.***
>
> Dakota has brought clarity to one of the most fragmented and overwhelming channels in the market. With structured, verified data across all major broker-dealers, Marketplace helps you cut through the noise and engage the right advisors fast.

Here's what you get:

- **Organized by Metro Area:** Navigate advisors and teams grouped by city for territory planning and local outreach.

- **Tailored Wealth UI:** A clean, dedicated interface built specifically for those calling on the wealth channel.
- **Verified Contact Information:** Access up-to-date emails, firm affiliations, team structures, and AUM all maintained by Dakota's in-house team.
- **Clean, Flexible Filters:** Filter by firm type, geography, channel, or advisor attributes to build focused call lists in seconds.

Bank Trust Data

> ***1,200+ verified bank trusts with relationship-driven data on trust departments, private banks, and wealth divisions designed to help you quickly identify the right people and opportunities across national, regional, and community institutions.***
>
> Dakota brings structure to one of the most difficult-to-navigate channels in fundraising. With curated profiles, verified contacts, and allocation insights, Marketplace helps you engage bank trust teams with clarity and precision.

Here's what you get:

- **Comprehensive Bank & Trust Coverage:** Access detailed profiles for major national Bank Trust platforms to regional and community trusts.
- **Verified Contacts:** Work with the right people, updated regularly, ready for your outreach.
- **Proprietary, relationship-driven data:** Built from two decades of direct fundraising experience, not scraped from the web.
- **Deep Visibility into Wealth & Private Banking Divisions:** Access key information on private wealth and private banking divisions.

Holdings Data

> ***18 asset classes and sub-asset classes of enriched 13F holdings data, connecting institutional positions to the allocators and contacts you need to act on.***
>
> A raw 13F filing tells you what an institution owns. It doesn't tell you who to call, how to reach them, or what those holdings mean in the context of a firm's mandate. Dakota ingests every 13F filing, enriches each position, and connects it to a complete allocator profile — turning static filings into sales-ready intelligence.

Here's what you get:

- **Daily Filing Ingestion:** SEC filings are received, parsed, and processed daily — not on the standard 45-day delay.

- **Enriched Holdings Taxonomy:** Every position is tagged across asset class, sub-asset class, strategy, geography, and vehicle type, spanning US and international equities, fixed income, hedge funds, private equity, private credit, private real estate, real assets, venture capital, crypto, and more.
- **Confirmed Contacts,** Not Just Positions: Every filing is matched to a known allocator and linked to verified, active contacts (names, roles, and outreach information) so you know who to call, not just what they own.
- **Connected Intelligence:** Holdings link directly to Form ADV, public pension data, plan minutes, and performance data, giving every position full firm-level context.
- **Competitive & Trend Tracking:** See which strategies and vehicles institutions are rotating into or out of, quarter over quarter, to spot where capital is concentrating, and where it's pulling back.

Performance and Benchmarking Data

Access verified performance data on 18,000+ private funds across Private Equity, Private Credit, Real Estate, Real Assets, and Hedge Funds – so you can benchmark your strategy against peers who invest the same way you do.

Dakota Benchmarks sets a new standard for private market performance insight. Built directly into Dakota Marketplace, it offers the most comprehensive and continuously updated view of private fund returns across every major asset class.

Here's what you get:

- Deep performance analytics backed by data from 18,000+ private funds across every major asset class
- Custom benchmarking tools for manager, peer, fund-type, and vintage comparisons – with fully customizable benchmarking to compare funds by vintage and investment approach
- Seamless integrations via API and the Snowflake Data Cloud
- Daily updates curated by Dakota's dedicated data research team

International Data

18,000+ UK & Europe contacts, including 8,300+ verified decision-makers in the UK, across the most active LP markets outside North America.

UK · Germany · Netherlands · Sweden · Switzerland · France
Denmark · Norway · Finland · Belgium · Austria · Italy · Spain

Dakota International is the only investor database built by fundraisers, for fundraisers – designed to help you raise capital faster, with accurate, up-to-date intelligence on family office, wealth management, and institutional investors worldwide.

Here's what you get:

- **Institutional & Intermediary Investors:** Gain visibility into global LPs and allocators actively deploying capital across private markets.
- **Verified Decision-Makers:** Access accurate contact info for CIOs, PMs, and key stakeholders so you spend less time searching and more time fundraising.
- **Clean, Intuitive Interface:** Built for speed and efficiency, so your team can move faster and operate with clarity.
- **Region & Country Filters:** Search by country, region, or city to support global territory planning and international travel.
- **No More Data Chaos:** Say goodbye to outdated contacts, scattered spreadsheets, and unreliable CRM records. Just the investors you need, all in one place.

Middle East Data

> ***1,000+ verified accounts and 2,700+ contacts across 18 countries, giving you unmatched visibility into one of the world's most capital-rich and relationship-driven allocator markets.***
>
> Dakota's Middle East data is purpose-built for fundraisers looking to engage high-intent allocators across sovereign wealth funds, family offices, pensions, insurers, and endowments. We've done the hard work of organizing a historically opaque market, so you can focus on building long-term relationships.

Here's what you get:

- **High-Intent Investors:** Access verified profiles of allocators actively deploying capital across the Middle East.
- **Verified Institutional Data:** Work with up-to-date, hand-curated profiles designed specifically for capital raisers, not just researchers.
- **Coverage Across All Major Asset Classes:** Match your strategy to active allocators investing across alts, traditional, and hybrid strategies.
- **Fundraiser-Friendly Tools:** Use Dakota's intuitive platform to track outreach, manage relationships, and support follow-up.
- **Advanced Search & Filtering:** Zero in by geography, check size, strategy, and other key criteria to build focused call lists.
- **Real-Time Updates:** Stay ahead of changing allocator priorities, new mandates, and capital deployment trends.

Private Company Data

Target the companies that matter with 165,000+ sponsor-backed portfolio companies and 1,000,000+ non-sponsor-backed companies, all curated for relevance.

Dakota's Private Company Data helps you map the market with precision. Unlike platforms that dump millions of scraped records, we deliver a focused, verified universe of companies backed by real ownership, transaction, and leadership intelligence.

Advanced filtering makes it easy to zero in on relevant businesses by sector, sponsor, geography, or deal activity so you can identify strategic targets and build outreach lists faster.

And because private company profiles are fully embedded in our platform, you can move seamlessly from a portfolio company to the transaction it was involved in, to the sponsor that backed it. All in seconds. One platform. Fully connected intelligence.

Private companies are often the missing link between fund strategies and actual market activity. Dakota's Private Company Data connects those dots giving you visibility into portfolio companies, ownership structures, leadership, and transaction history.

Instead of relying on fragmented profiles or outdated sources, Dakota delivers a centralized, constantly updated view of private company intelligence that turns static data into actionable insight.

Here's what you get:

- **Comprehensive Company Profiles:** Detailed business descriptions, industry classification, HQ location, and key company attributes.
- **Ownership & Sponsor Visibility:** See which private equity firms and funds own or have backed a company.
- **Executive & Board-Level Contacts:** Access verified contact info for key leaders to support relationship-building, diligence, and outreach.
- **Transaction & Capital History:** Track historical capital raises, ownership changes, and M&A activity to understand company evolution.
- **Portfolio Company Mapping:** Connect companies back to their sponsors to see how strategies are executed across funds.
- **Integrated Workflow:** Private company data links directly to accounts, relationships, and transactions so you can move from research to action without missing a step.

Transaction Data

> ***28,000+ transactions tracked in Dakota Marketplace, hand-curated by our research team to give you verified, context-rich deal intelligence beyond the headlines.***
>
> Unlike most platforms that scrape press releases and call it data, our transactions are hand-curated by our research team. Every deal is verified, tagged, and connected to the parties involved so you can move beyond announcements and into real business development.

Here's what you get:

- **Comprehensive Market Visibility:** Track deals across all private markets including private equity, venture capital, private credit, real estate, and infrastructure, with full visibility into every participant in the transaction.
- **Actionable Intelligence:** Identify active buyers and sellers, monitor competitor strategies, uncover advisor relationships, and find new opportunities faster.
- **Curated, Not Scraped:** Every transaction is researched and verified by our team to ensure accuracy, relevance, and completeness.
- **Powerful Filtering:** On the Transactions Tab, you can filter by buyer, seller, industry, sector, sub-industry, and transaction value – and even search by segment to give you a custom, searchable feed tailored to your focus.
- **Salesforce-native and Workflow-ready:** Dakota Transactions is built on Salesforce and fully compatible with DealCloud, Affinity, Dynamo, and API environments. Transactions are linked directly to accounts, allowing you to track firm activity and deal history over time. This creates a living record of relationships and transactions inside the CRM you already use.

IV. UTILIZING DAKOTA MARKETPLACE

At Dakota, every feature we build in Dakota Marketplace is designed with one goal in mind: To make life easier for the fundraisers and investors using it every day. These professionals are balancing research, outreach, meetings, and decisions – so we think deeply about how to simplify that work.

We've built tools that eliminate manual tasks, surface the right data faster, and integrate seamlessly into how our members already work. Below are four key features that Dakota Marketplace members rely on to save time, stay focused, and operate more efficiently.

Dakota's AI Assistant – Natural Language Salesforce Report Builder

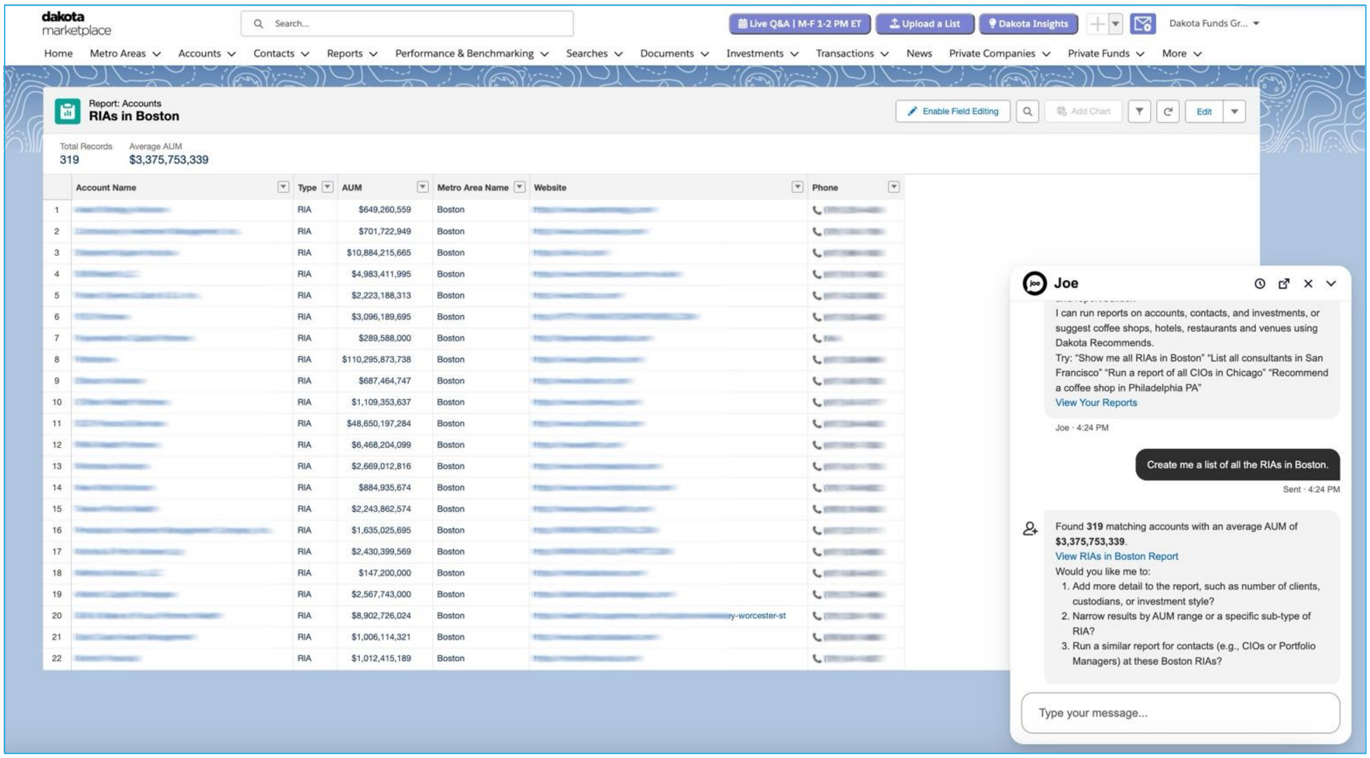
We know building reports can be a pain. That's why we built our AI assistant: a natural language Salesforce report builder right inside Dakota Marketplace. Using natural language, you can generate custom, presentation-ready reports across Accounts, Contacts, Investments, Transactions, News, University Alumni, Searches, and Dakota Recommends data in seconds.

Simply tell Joe what you want to see (by segment, time period, or strategy) and it builds the report for you, for example: "Create a list of RIAs in Boston above $1B AUM with CIO contacts who invest in venture capital."

With Dakota Joe, you can:

- Generate reports instantly using natural language
- Slice across Accounts, Contacts, Investments, Transactions, News, University Alumni, searches, and Dakota Recommends
- Apply consistent, presentation-ready formatting
- Edit filters and rerun reports anytime

Every report is auto-saved to your company's secure folder in the Reports tab, and shareable with your team's users of Marketplace. Once a report is created, you remain fully in control. Edit filters, adjust columns, and re-run reports at any time.



Dakota's MCPs – Claude & Chat GPT Connectors

Your fundraisers are already living in Claude or ChatGPT. That's why we built the Dakota Marketplace MCP: a connector that brings Dakota Marketplace's data directly into the AI tools your team uses every day, with no code, no engineering, and no setup required.

Instead of logging into Marketplace, building a filtered search, and exporting a list, your team can just ask. Prep for a trip, qualify a prospect, or draft outreach — all without leaving the conversation they're already having.

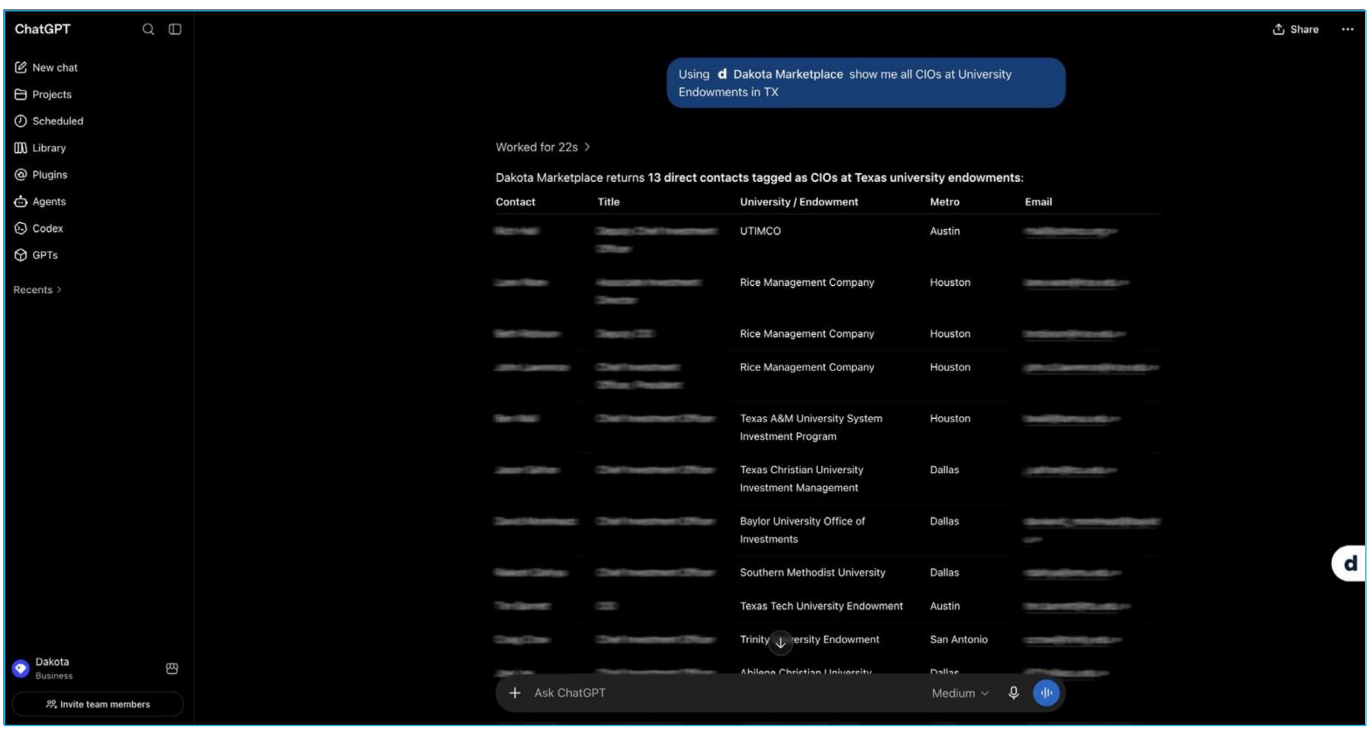
With the Dakota Marketplace MCP, your team can:

- Build targeted call lists and prospect lists on the fly, before a trip or between meetings
- Research any account instantly, investment preferences, recent activity, and key contacts, without pulling up Marketplace
- Draft outreach and meeting prep in seconds, grounded in real Dakota data instead of a blank page
- Source deals and identify targets using the same live data your team already trusts
- Work from wherever they are, with no engineering, no fees, and no setup beyond signing in with their Dakota Marketplace credentials

Ask it things like:

"Find family offices in Chicago allocating to private credit."
"Build a list of RIAs with AUM over $1B interested in alternatives."
"Summarize GIC Group's investment preferences and recent activity."
"Draft a cold email to the CIO at Rockefeller Capital Management."
"What should I know before calling Siguler Guff tomorrow?"

The Dakota Marketplace MCP is included with every Marketplace subscription at no additional cost, and works inside Claude and ChatGPT, with Copilot and Amazon Bedrock coming soon.



Dakota Chrome Extension

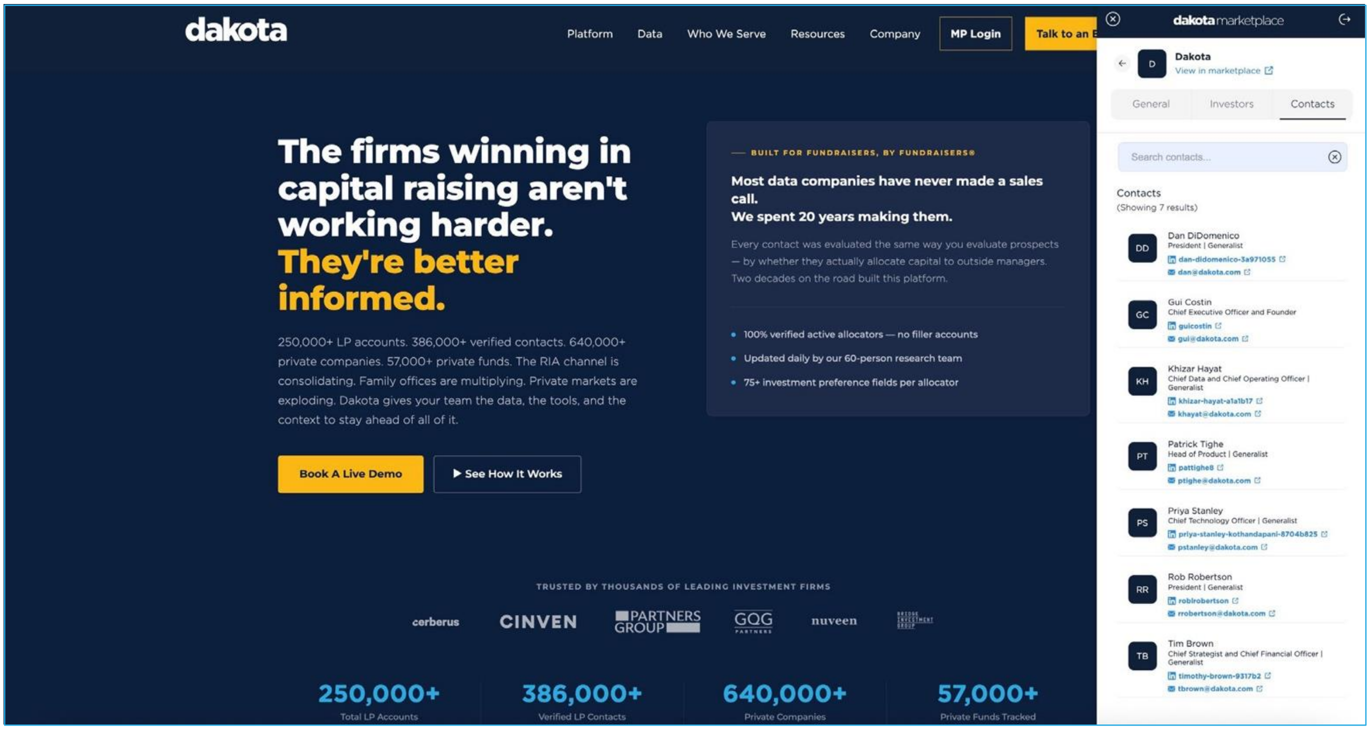
Time is your most valuable asset, which is one of the reasons we built the Dakota Marketplace Chrome Extension. This extension helps you protect it by bringing Dakota Marketplace data straight into the websites you already use.

No more switching tabs, copying links, or searching manually. Whether you're researching an RIA, vetting a private company, or scanning for contact info, relevant Dakota insights appear automatically… right in your browser.

With the Dakota Chrome Extension, you can:

- Access Dakota Marketplace insights from any webpage
- Instantly understand how a firm invests and who the key decision-makers are
- Cut out the copy-paste and skip repetitive searches
- Identify and qualify opportunities faster without breaking focus

It's seamless, fast, and built to help you work smarter – with Dakota intelligence just a click away.



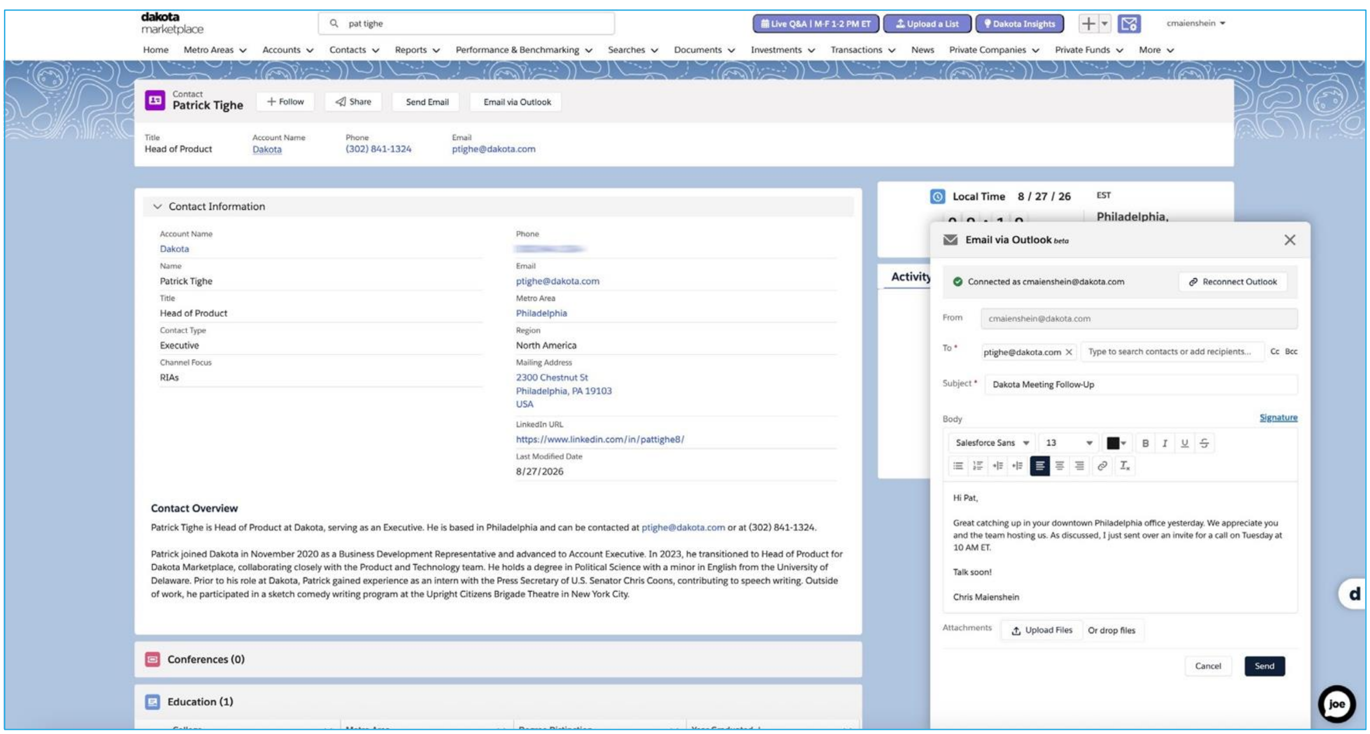
Dakota's Outlook Integration

Reaching out to a contact shouldn't mean leaving Dakota Marketplace to do it. That's why we built Outlook Integration: a direct connection between your Outlook account and Marketplace that lets you send emails to contacts without ever switching tabs.

Once connected, a "Send with Outlook" button appears right where you need it. Send a message to a contact from inside Marketplace, and it's delivered from your own Outlook account, lands in your Sent Items, and stays visible back in Marketplace, so your outreach and your records live in one place.

With Dakota's Outlook Integration, you can:

- Send emails to contacts directly from Dakota Marketplace
- Have sent messages sync automatically to your Outlook account and stay visible in Marketplace
- Connect in a few clicks, with no IT setup required
- Rely on your normal Microsoft 365 retention and archiving policies, since sent emails land in your real Outlook Sent Items



Private Fund Performance

Most benchmark providers force you into rigid, broad peer groups that don't reflect how your strategy or portfolio actually operates. Using the Private Fund Performance tab, you get the power to define your own peer universe and evaluate performance on your terms.

The Private Fund Performance tab gives you a comprehensive, continuously updated view of private fund performance across every major asset class directly inside Dakota Marketplace.

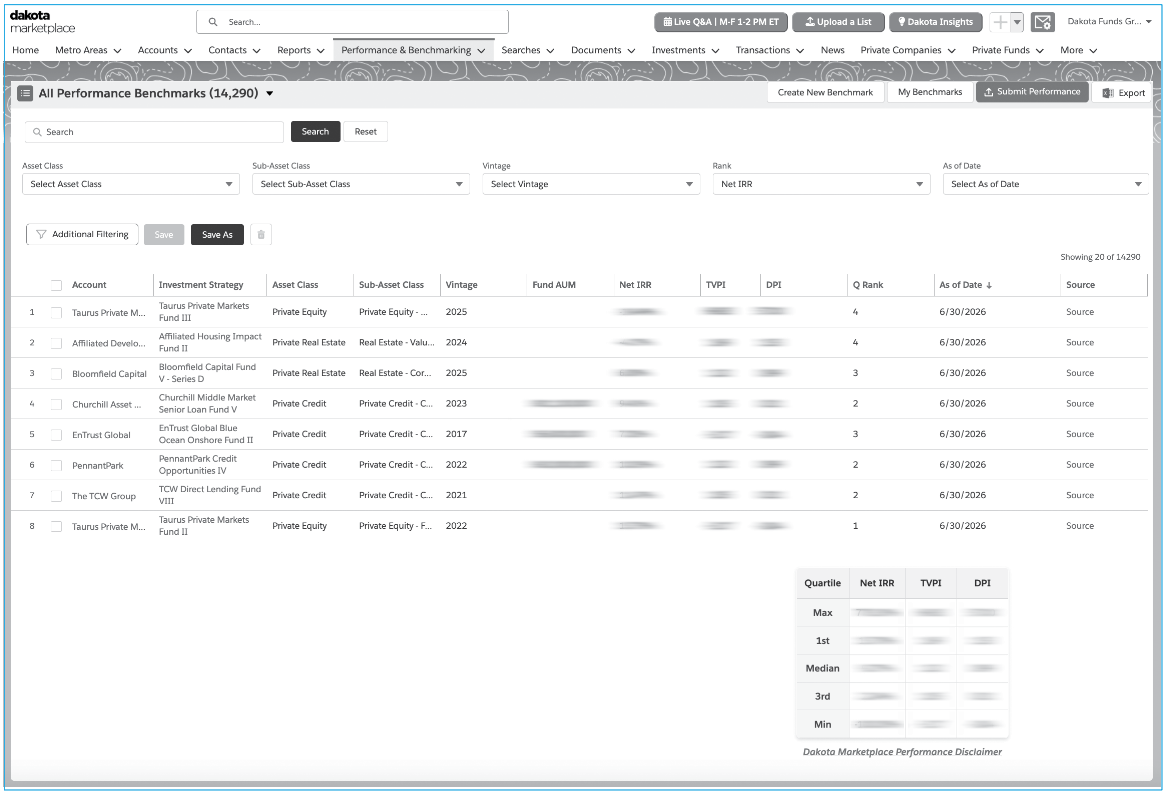
Built for LPs, GPs, and advisors, this tool enables confident decision-making at every level:

- LPs can evaluate managers and portfolios with clarity and confidence
- GPs can position their track records credibly against true peers
- Advisors gain the context needed for better allocation, pacing, and strategy calls

With Dakota's Benchmarking data, you can:

- Compare 18,000+ private market funds
- Build benchmarks by strategy, vintage, geography, or industry
- Analyze IRR, TVPI, DPI, and RVPI
- View medians, quartiles, and full performance distributions
- Link fund performance to underlying companies and transactions
- Export to Excel in seconds

Forget stale PDFs or generic datasets. Dakota Benchmarks puts verified, transparent return data in your hands so you can benchmark smarter, move faster, and evaluate performance in the right context.

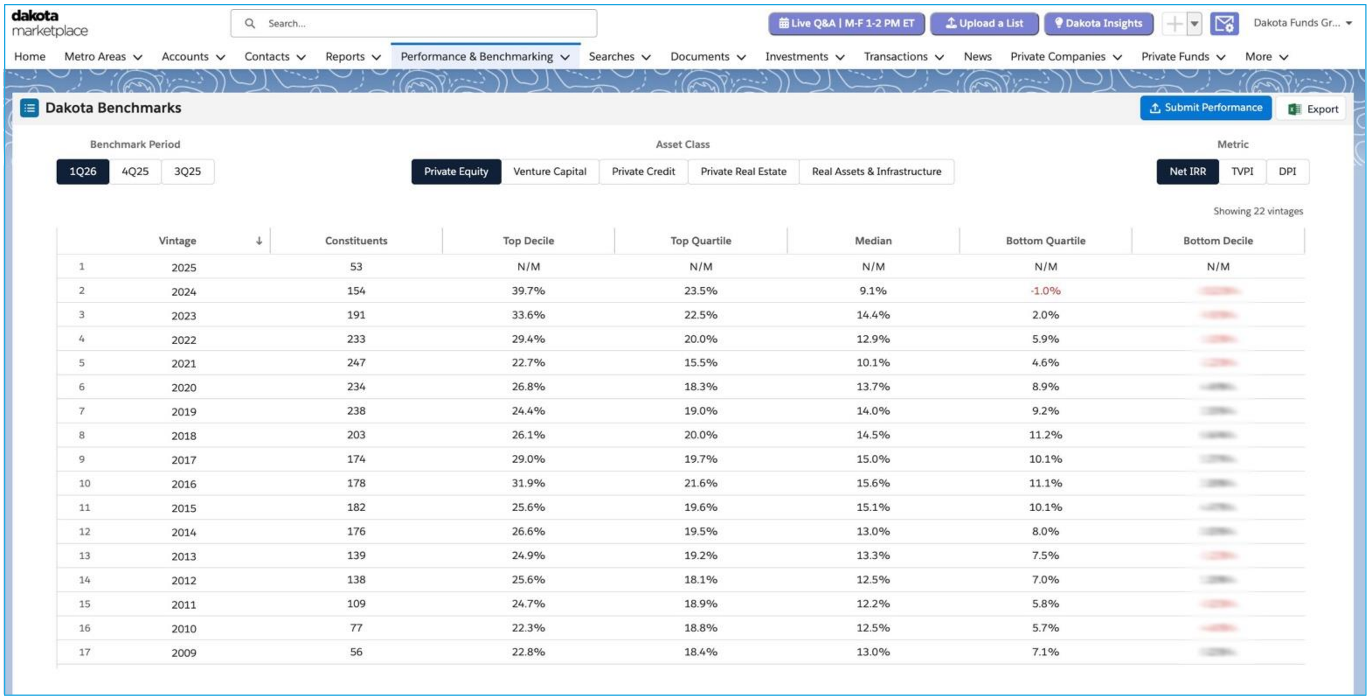


Dakota Benchmarks

Where the Private Fund Performance tab lets you build your own peer group on the fly, Dakota Benchmarks is our research team's own curated benchmark, built and maintained in-house rather than assembled fund-by-fund on demand.

With Dakota Benchmarks, you can:

- Filter by portfolio company sector: software, industrials, healthcare, energy, consumer, and more — the one filter no other benchmarking tool offers
- Drill into sub-industry granularity: distinguishing enterprise software from consumer tech, or upstream energy from renewables
- Layer sector on top of asset class, strategy, vintage, and geography for a peer group that reflects exactly how your fund invests
- See every filter criterion used to build the peer group, so LPs and investment committees can examine and validate the comparison rather than trust a black-box number
- Go beyond IRR, TVPI, and DPI with PME and Called % for full J-curve and public-market context
- Rely on a benchmark maintained and quality-checked by Dakota's research team, not self-assembled on the fly



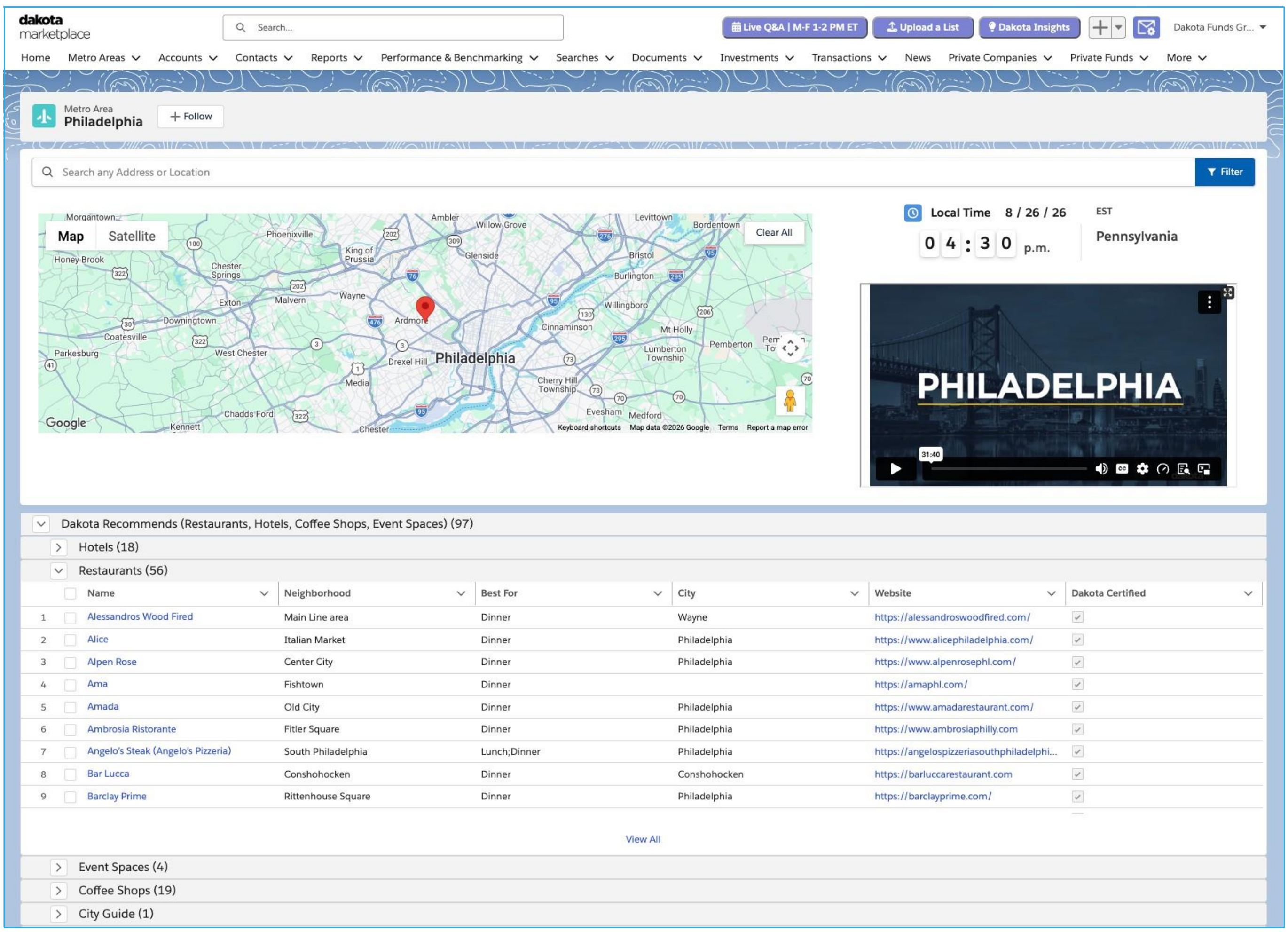
	Vintage	Constituents	Top Decile	Top Quartile	Median	Bottom Quartile	Bottom Decile
1	2025	53	N/M	N/M	N/M	N/M	N/M
2	2024	154	39.7%	23.5%	9.1%	-1.0%	[illegible]
3	2023	191	33.6%	22.5%	14.4%	2.0%	[illegible]
4	2022	233	29.4%	20.0%	12.9%	5.9%	[illegible]
5	2021	247	22.7%	15.5%	10.1%	4.6%	[illegible]
6	2020	234	26.8%	18.3%	13.7%	8.9%	[illegible]
7	2019	238	24.4%	19.0%	14.0%	9.2%	[illegible]
8	2018	203	26.1%	20.0%	14.5%	11.2%	[illegible]
9	2017	174	29.0%	19.7%	15.0%	10.1%	[illegible]
10	2016	178	31.9%	21.6%	15.6%	11.1%	[illegible]
11	2015	182	25.6%	19.6%	15.1%	10.1%	[illegible]
12	2014	176	26.6%	19.5%	13.0%	8.0%	[illegible]
13	2013	139	24.9%	19.2%	13.3%	7.5%	[illegible]
14	2012	138	25.6%	18.1%	12.5%	7.0%	[illegible]
15	2011	109	24.7%	18.9%	12.2%	5.8%	[illegible]
16	2010	77	22.3%	18.8%	12.5%	5.7%	[illegible]
17	2009	56	22.8%	18.4%	13.0%	7.1%	[illegible]

Dakota Recommends

If you travel often, you know the drill… new cities, tight schedules, and no time to guess where to stay, meet, or eat. That's why we built out Dakota Recommends.

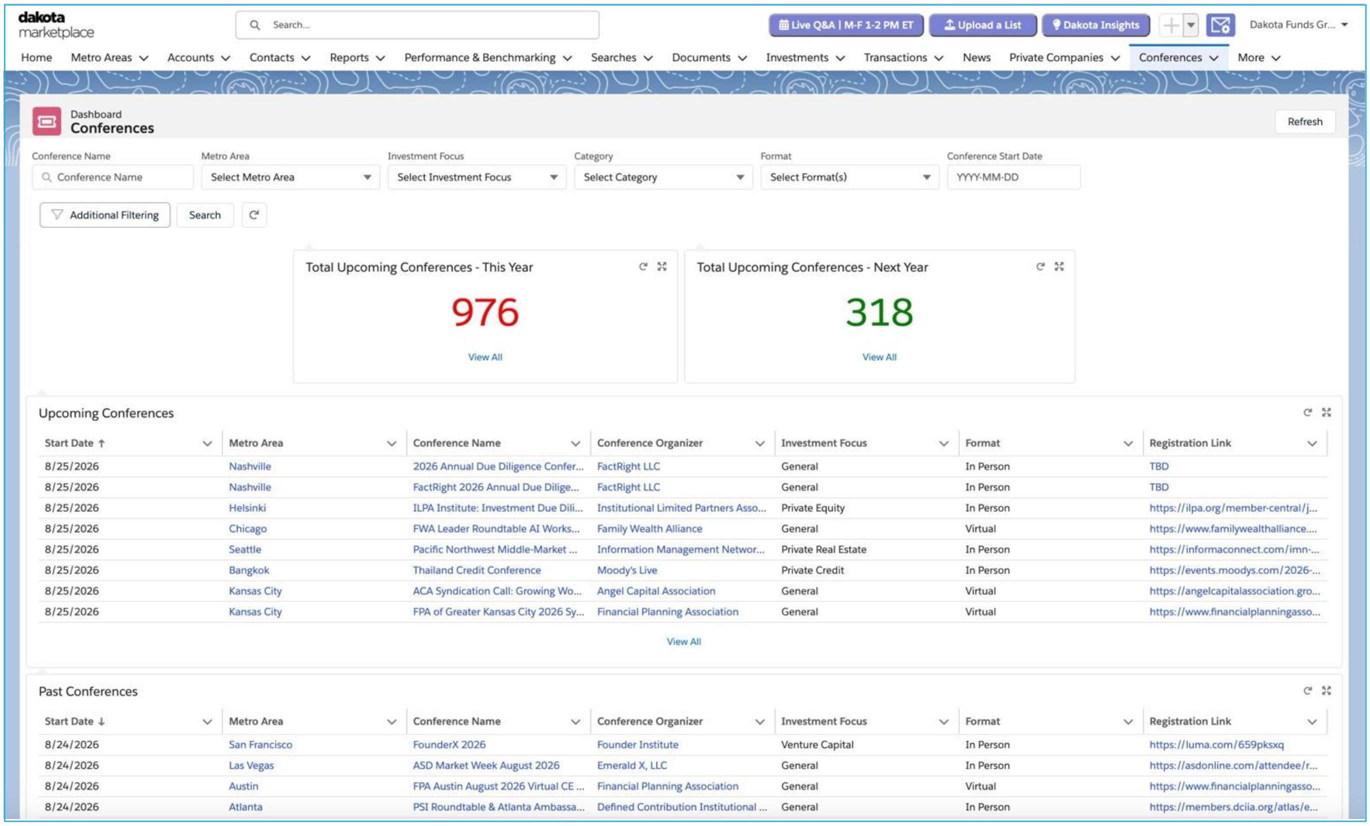
It's a curated, travel-tested guide designed for investment professionals. No crowdsourced noise. Just real, verified recommendations from the Dakota team tailored to how business actually gets done.

> Whether you're booking a hotel, planning a dinner, or looking for the perfect coffee spot between meetings, Dakota Recommends helps you decide fast and travel smart.
>
> Each listing includes our "Dakota Must Trys", insider picks from best rooms to standout dishes, so you can skip the guesswork and focus on the work that matters.



Access Conferences & Speakers

Access conferences for a searchable view of upcoming industry conferences, filterable by investment focus, metro area, date, and format, so you always know what's on the calendar and where.



But knowing which conferences are happening isn't always enough. Many teams book travel and prioritize events based on a different question: who's actually going to be there. So we took this one step further and built the Conference Speakers sub-tab, giving you visibility into every speaker at every conference Dakota tracks, not just the event itself.

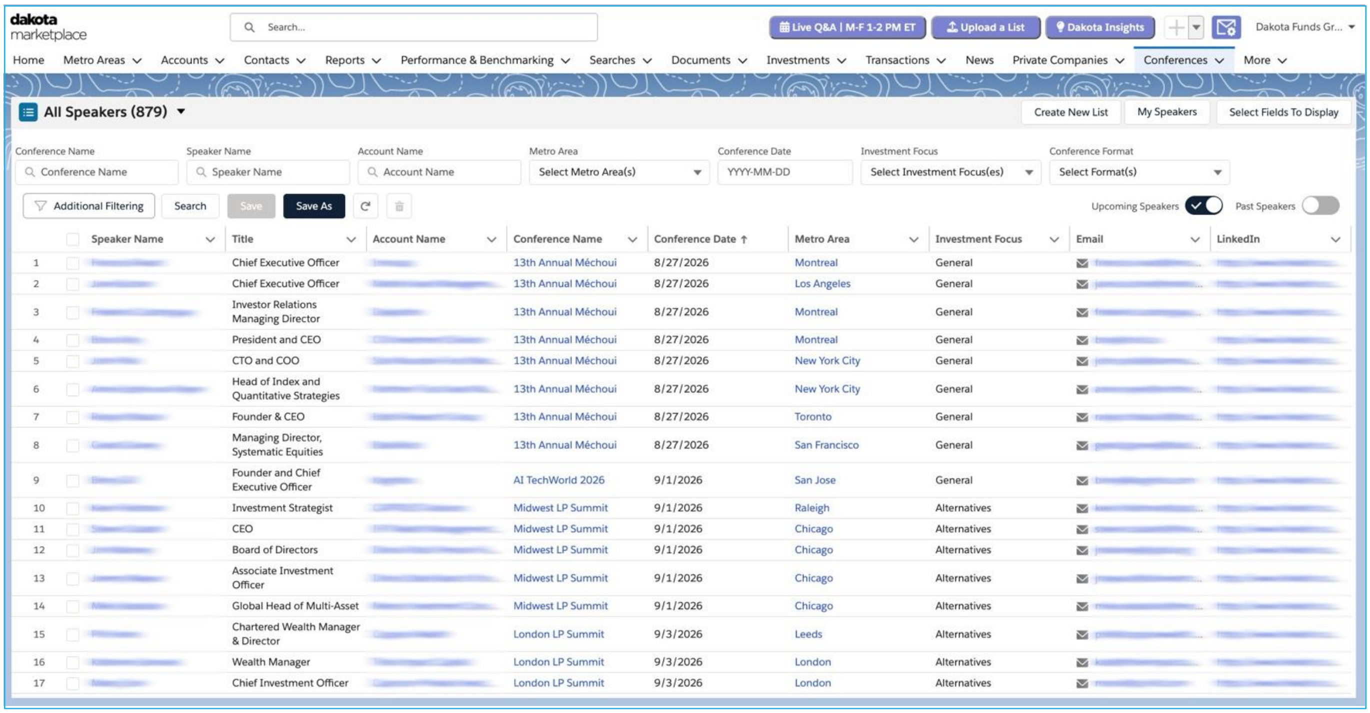
With 1,000+ conference speakers in Marketplace across upcoming and past events, you can search and filter by Speaker Name, Title, Account, Conference, Date, Metro Area, Investment Focus, Email, and LinkedIn, and toggle between Upcoming and Past speakers to see who's on deck or who's already spoken.

Here's what you get:

- **Speaker-Level Search & Filtering:** Find speakers by name, title, account, conference, date, metro area, investment focus, email, or LinkedIn, with additional filtering for more granular searches.
- **Upcoming & Past Speaker Toggle:** Default to upcoming speakers to plan ahead, or switch to past speakers to follow up after an event or revisit who spoke where.

Here's what you get *(continued)*:

- **Build & Save Speaker Lists:** Create new lists or maintain "My Speakers" to track the contacts and firms that matter most to your outreach.
- **Connected to the Contact Record:** Every speaker links back to their underlying Contact, and every Contact page now includes a Conferences related list, so speaking history is visible without leaving the record.
- **Follow Notifications:** Follow a contact or account, and if that contact is newly listed as an upcoming conference speaker, you'll see it in your email notification updates, even if you only follow the account.



A contact or account on a conference agenda is a signal: a reason to reach out, a reason to book a meeting, and a reason to prioritize that conference on your travel calendar. Now Marketplace supports both ways teams plan around conferences: the Conferences tab for those who prioritize the event itself, and the Speakers sub-tab for those who prioritize who's in the room.

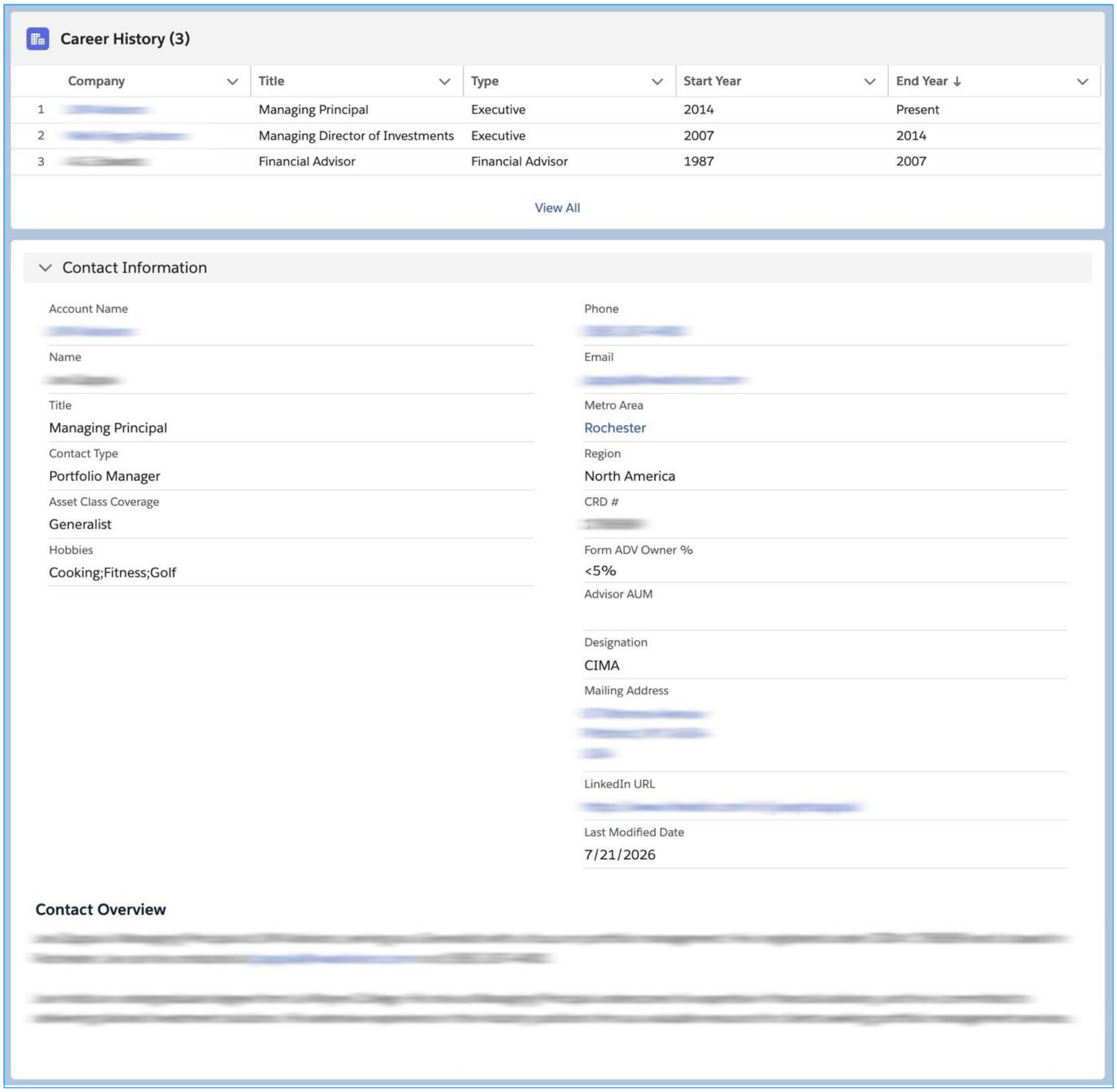
Contact Intelligence: Career History & Hobbies

The best conversations don't start with a pitch, they often start with something in common. That's why we've built out two newer layers of contact intelligence inside every Dakota Marketplace profile.

Career history shows you where a contact worked before their current role, so you walk into a conversation understanding their full background and the relationships they may still carry from prior firms. Hobbies show you the sports, activities, and interests a contact has expressed… an easy way to open with something other than AUM.

Both are growing datasets our research team adds to continuously. Career history now covers records for allocator contacts across Marketplace, and hobbies are already live on 7,000+ contact pages and climbing.

There's no separate tool or report to run. Career history and hobbies show up right on the contact record you're already viewing, so you can walk into every call or meeting with something real in common.



V. WHAT TO EXPECT FROM YOUR MEMBERSHIP

A membership with Dakota is not as simple as signing your contract and closing a business deal. We have a dedicated Customer Success team whose goal is to ensure that you're more than satisfied with our database, and are there to help throughout the entirety of your membership.

In this section we will review three things you can count on from your membership with Dakota.

1 COMPREHENSIVE ONBOARDING & ONGOING TRAINING

Once you join Dakota Marketplace, our Customer Success team reaches out immediately to schedule a personalized onboarding session for your team. We also offer training for any new team members throughout the year so no one's left behind!

As Dakota Marketplace evolves, we keep you informed. Our team will share updates on new features and enhancements, along with practical guidance on how to use them to ensure your team gets the most value out of the platform.

Whether it's one user or one hundred, we're here to help.

2 UNMATCHED SUPPORT

Our Customer Success team is always within reach. You'll have access to dedicated support via email or phone, plus open Office Hours where product experts are ready to assist in real time.

We don't just wait for you to call, we proactively check in each quarter to stay aligned with your evolving goals and show you how to leverage Dakota Marketplace to meet them!

3 PROVIDING VALUE

We don't believe in one-size-fits-all outreach. As we learn more about your firm's structure, priorities, and goals, we tailor our communication to deliver what's most relevant… whether it's new data sets, product features, or market research.

Our goal is to be a true partner: One that brings you timely, actionable insights that make your work easier and more effective.

VI. WHAT OUR CUSTOMERS ARE SAYING

If you still need more convincing, here are some words from our current customers of Dakota Marketplace, and how the platform has helped them:

> **Dakota Marketplace has become our team's go to database for sales and prospecting efforts. Its geographic breakdown of the metro area makes the logistics of planning trips seamless, as well as the deep information provided on different types of retail and institutional allocators has helped our team prioritize outreach and potential relationships.**

SMEAD capital management — **$7+B AUM** | *Long-Only Equities Manager*

> **The Dakota product is a must use tool in the fundraising world. We have found it to be a very leverageable source of information to extend our existing Limited Partner reach while staying on top of personnel movements around the industry.**

OLD CITY INVESTMENT PARTNERS — **$13+B AUM** | *Third Party Marketer*

> **Our firm really benefited from using Dakota's resources. Their support team is exceptional, responsive, knowledgeable, and consistently available to answer any questions. The 5 minute demo videos are especially helpful.**

MARATHON ASSET MANAGEMENT — **$24B AUM** | *Long-Only Fixed Income Manager*

> **Dakota is the first database I go to when looking for insights and contact info on LP orgs. Whether I am building a trip to a specific city, or looking to get more info on an existing relationship, Dakota has unique and real-convo-sourced data to help me be a better marker.**

DRIVE — **$2B AUM** | *Venture Capital Firm*

See More →

VII. GET STARTED

Get Started →

START SIMPLIFYING YOUR INVESTMENT PROCESS TODAY

Partnering with Dakota is simple. We take the time to understand your goals and provide the tools, data, and support to streamline how you raise, allocate, and manage capital.

A DAKOTA PARTNERSHIP IS SIMPLE

Partnering with Dakota is easy. We work to understand your firm's needs, and provide the resources you need to be a better salesperson.

1. Schedule a Call
2. Access Dakota's Sales Tools
3. Accelerate Your Sales Pipeline

dakota marketplace

PRICING: **$16,500**

$1,000 for each additional user login

Becoming a member of Dakota Marketplace is becoming a part of our firm, we hope you can see this through our dedicated onboarding process and continuous, 24/7 support throughout your partnership.

Book a Demo of Dakota Marketplace →

VIII. DAKOTA'S APIS & INTEGRATIONS

Not every firm wants to work inside another platform. If your team already lives in your own CRM, dashboards, or internal tools (and you'd rather Dakota's data come to you than log into Marketplace to get it) this is that path. Firms use Dakota's API to own the data outright: pulling it into their own systems to power custom scoring models, real-time alerts the moment a new account is added, competitive intelligence libraries, or a nightly sync that only pulls what's changed. It's a different job than Marketplace itself, less "log in and search," more "build it into what we already run."

Dakota API

At Dakota, we know some teams prefer to work directly with data inside their own applications, dashboards, and internal tools. That's why we built the Dakota API, so you can access Dakota's trusted data without logging into Dakota Marketplace or exporting spreadsheets.

Our API allows you to programmatically pull Dakota Marketplace data into your existing systems, giving your team the flexibility to build custom workflows, reporting, and automation tailored to how you operate.

Required Package:

- LP Data – US & Canada

Add-On Packages:

- LP Data – International
- GP Data
- Financial Advisors
- 13F Data
- Private Company Data
- Metro Areas
- Searches & RFPs
- Investments
- Transactions
- News
- Job / Role Changes
- Private Funds
- Conferences
- Performance & Benchmarking
- Full Access
- Custom Data

PRICING: CUSTOM

Dakota's CRM Integrations

We built our integrations so you don't have to toggle between Dakota Marketplace and your CRM to get work done. With Dakota Integrations, you can link and sync Dakota Marketplace data directly into the systems you already use keeping everything centralized, current, and easy to access.

Dakota Integrations connect Dakota's verified account and contact intelligence to your CRM, ensuring your team always works from a single source of truth without manual data entry or constant switching between platforms.

With Dakota Integrations, you can:

- Sync Dakota-verified accounts and contacts directly into your CRM
- Keep records automatically updated as data changes
- Reduce duplicate, outdated, or incomplete data
- Eliminate manual imports and exports
- Streamline workflows across sales, research, and relationship management

Our CRM integrations support platforms including Salesforce, HubSpot, Microsoft Dynamics, Intapp DealCloud, Dynamo, and more — allowing Dakota intelligence to fit seamlessly into your existing workflow.

PRICING: **CUSTOM**

Dakota Marketplace For Salesforce App

For many fundraisers, Salesforce isn't just a CRM, it's the system their entire distribution team runs on. So rather than asking you to copy and paste from Marketplace or export to Excel every week, we built the Dakota Marketplace for Salesforce App: a native app on the Salesforce AppExchange that pushes Dakota's account and contact intelligence directly into the Salesforce instance you already use.

It's a managed platform, not a typical iframe or API-based integration. You install it from the Salesforce App Store, connect your Dakota membership, and your data starts flowing in, no custom development, no developer contracts, no months-long implementation. The app has been live for years and is used by 200+ investment firms today.

Here's what you get:

- **A dedicated Dakota Marketplace subtab inside Salesforce.** All Dakota data lives side by side with your existing records, without overriding anything you already have.
- **Real-time updates.** As allocator personnel change roles, firms merge, or new accounts enter the Dakota universe, your Salesforce reflects it immediately, not on the next manual import.
- **Full transparency on every change.** A Marketplace Updates panel shows every field change, with the old value, new value, and modification date, so nothing updates silently.
- **Follow specific records.** Users can follow individual accounts or contacts and get notified by email whenever a field changes, without being bogged down by teammates' notifications.
- **Metro Areas built for territory planning.** City-level scheduling, mapping, and Dakota Live! content, all inside Salesforce, so travel planning and account targeting happen in one place.
- **The full Marketplace dataset, searchable in Salesforce.** Search tabs for consultant reviews, pension documents, fund presentations, earnings intelligence, private funds, fund launches, hedge fund performance, private companies, private fund performance, alumni networks, and more.
- **13F filings and holdings data,** mapped to RIA account records, so you can see which RIAs hold your products and how positions have shifted quarter over quarter.
- **Nearby Accounts,** a map-based view on any Account or Contact page showing other allocators located near the one you're viewing, useful when you're building a trip.

PRICING: CUSTOM

BOOK A DEMO OF DAKOTA MARKETPLACE FOR SALESFORCE

Book a Demo →

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