

Datasets:

- Dakota's full database export from 6/6/2025.
- RAM Salesforce contact snapshot 6/11/2025.

Final Merged Dataset:

First name | Last Name | Title | Company Name | Email | Mailing Street | Mailing City |
Mailing State | Mailing Zip/Postal Code | Mailing Country | Phone | Company Owner

- Company name merged with account name in Dakota

Steps Taken

- Cleaned both datasets to remove duplicates by scanning identical emails
 - o Salesforce: 17 duplicates, 48,660 unique emails (out of 48,677, 99.97% quality)
 - o Dakota: 12,822 duplicates, 154,203 unique emails (out of 167025, 92.32% quality)
- Wire houses removed from both databases
 - o Wire houses included (multiple names of funds by these companies were captured with fuzzy matching (e.g.: if title is Blackrock ____ Fund, then remove)
 - Bank of America / Merrill Lynch
 - Wells Fargo
 - Morgan Stanley
 - J.P. Morgan
 - UBS
 - Ameriprise
 - Raymond James
 - Goldman Sachs
 - BlackRock
 - Edward D. Jones
 - o Salesforce: 1,177 wire house contacts found, 37,629 non-wire house contacts (77.3%)
 - o Dakota: 77,743 wire house contacts found, 76,460 non-wire house contacts (45.78%)
- State ownership for Dakota mapped off Owner ID Excel tab
 - o See original here: [RIA_new_contacts_formatted.xlsx](#)

Key Observations

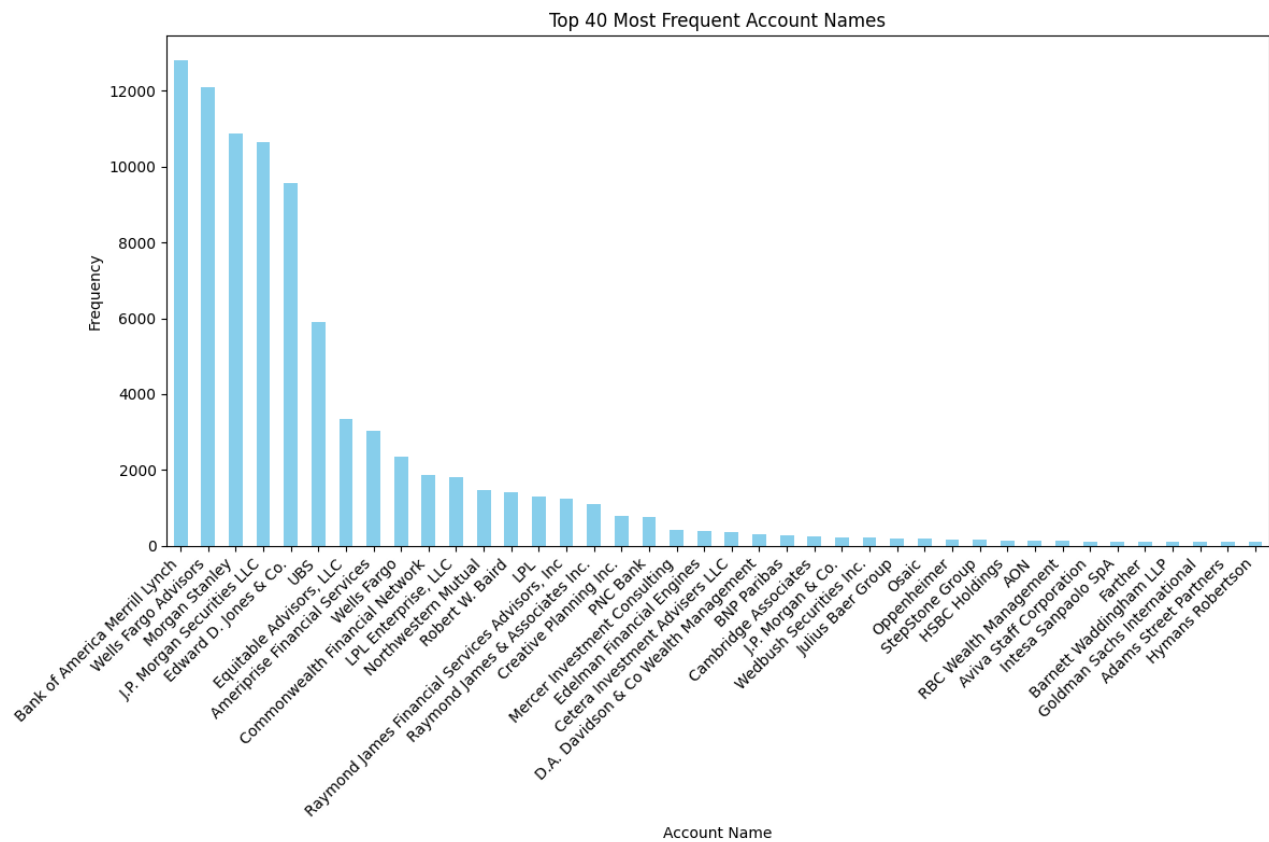
- While Salesforce had fewer duplicates, there are a lot of empty fields with corresponding emails. The Dakota merger does not amend this as there is very little overlap between the contacts.
- More international data (London) in Dakota

Data Match: Noteworthy Statistics

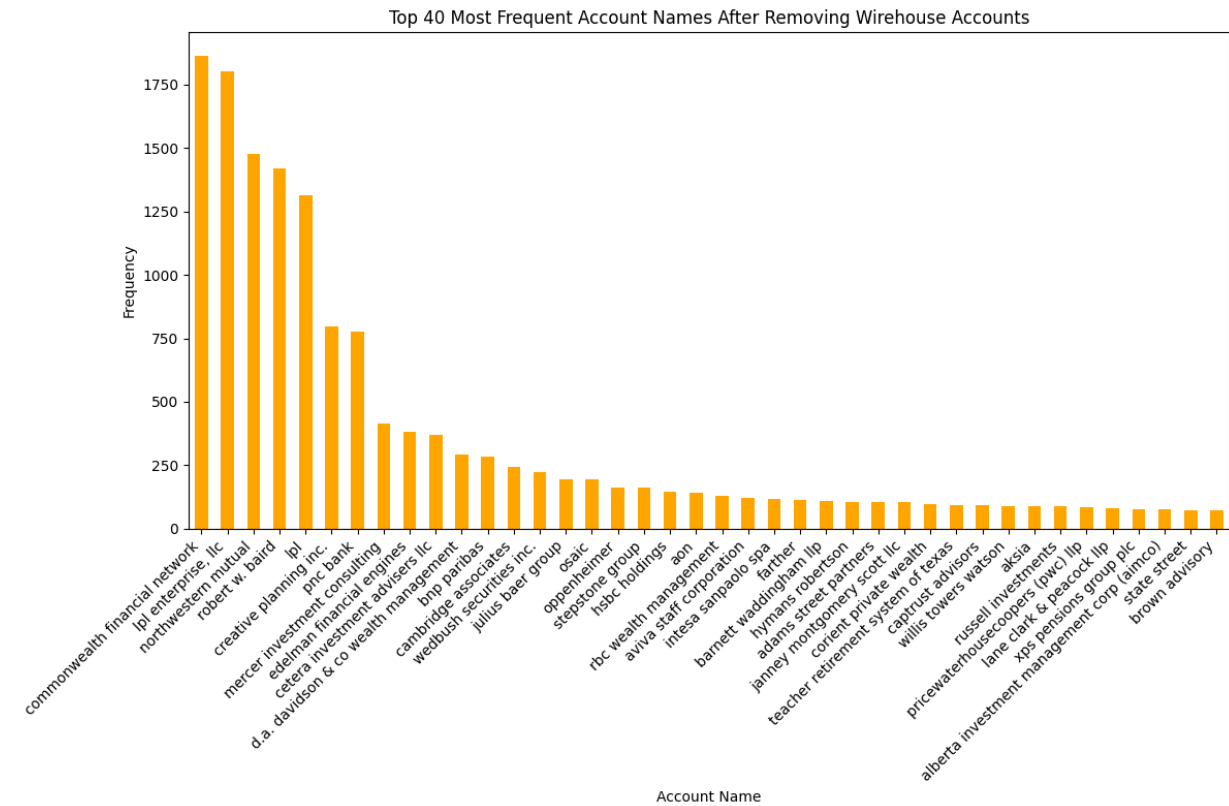
- New, non-overlapping contacts added from Dakota: 76,122
- Total contacts after data merger: 113,750
- Dakota contacts that overlapped with Salesforce (were excluded in final data): 0.44%

Appendix:

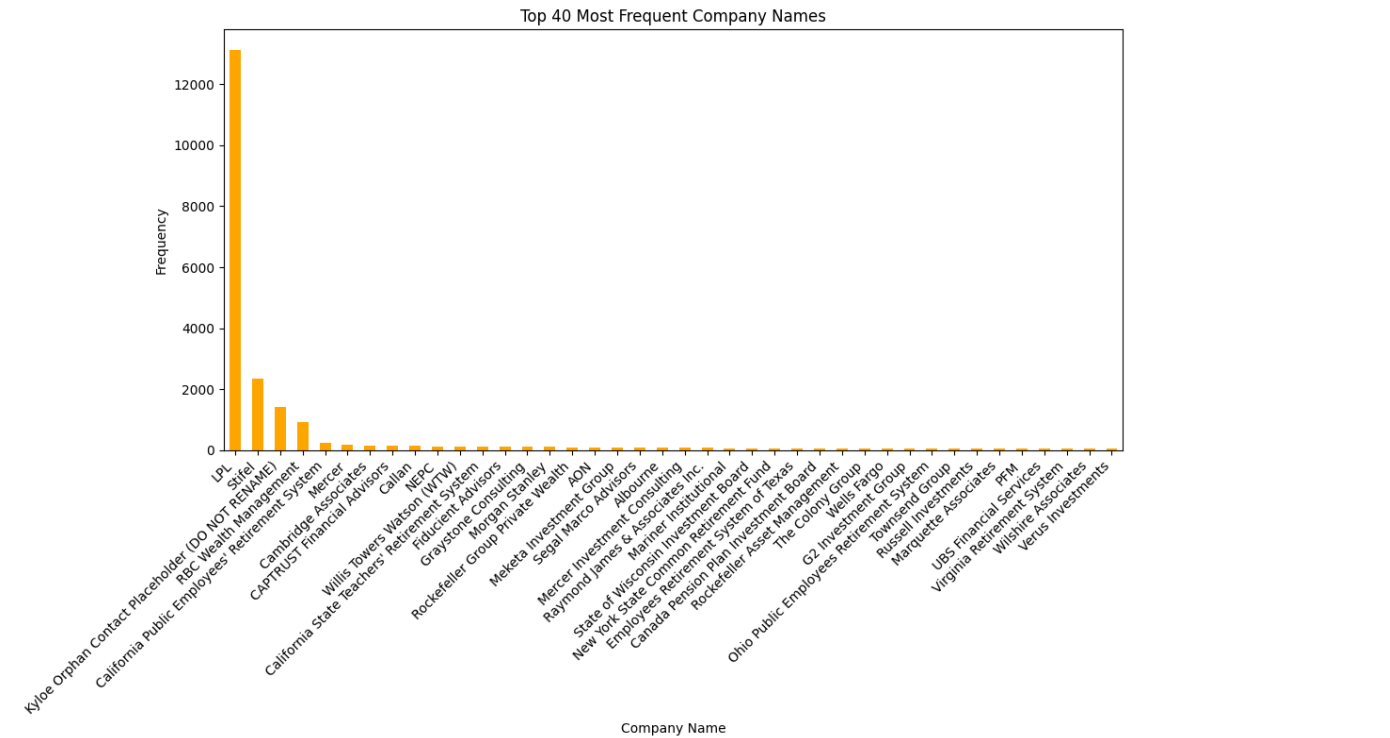
Dakota Pre Wire House Removal



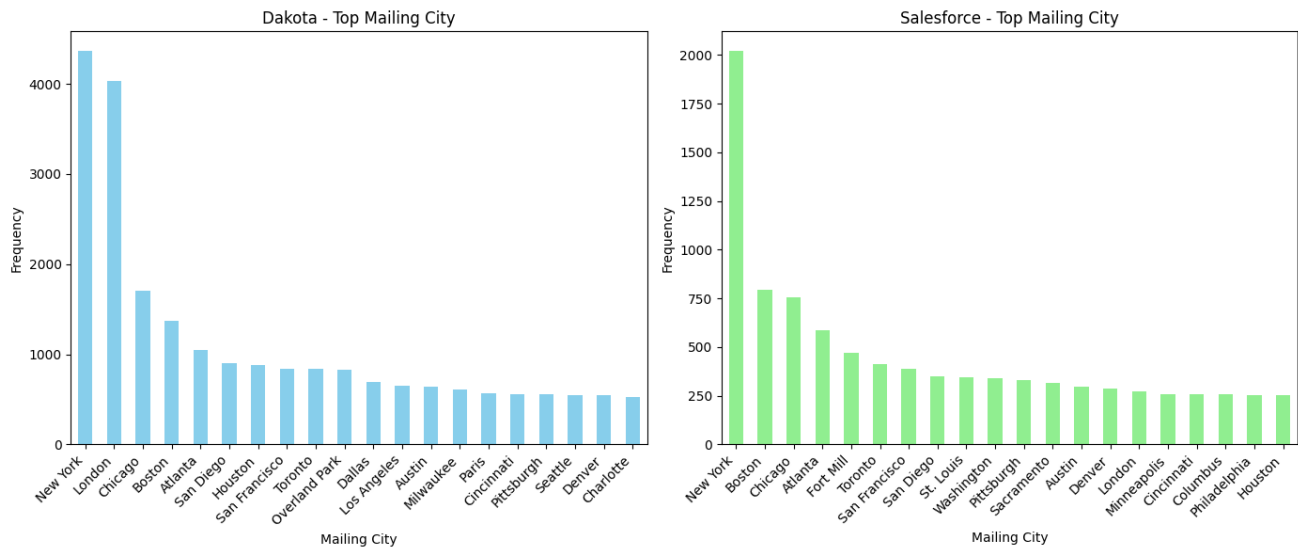
Dakota Post Wire House Removal



Salesforce Most Common Company Name



Salesforce X Dakota Merge Documentation 6/17/2025



Wirehouses Found in Salesforce

Wells Fargo	398
Ameriprise	189
Raymond James	136
UBS	124
Morgan Stanley	117
Merrill Lynch	66
Goldman Sachs	48
J.P. Morgan	45
BlackRock	42
Edward Jones	12
Total	1177

Wirehouses Found in Dakota

Wells Fargo	19492
Merrill Lynch	12809
Morgan Stanley	10973
J.P. Morgan	10911
Edward Jones	9568
UBS	6593
Ameriprise	3954
Raymond James	2933
Goldman Sachs	272
BlackRock	237
Total	77742

Salesforce X Dakota Merge Documentation 6/17/2025

Missing Values in Salesforce (cleaned)

Salutation	37625
First Name	106
Last Name	0
Title	2275
Company Name	0
Mailing Street	10619
Mailing City	1427
Mailing State/Province	2279
Mailing Zip/Postal Code	22078
Mailing Country	1286
Phone	6431
Fax	27533
Mobile	37623
Email	0
Company Owner	0

Missing Values in Dakota (cleaned)

ContactID	0
First Name	30
Last Name	0
Email	0
Account ID	0
Account Name	0
Metro Area:	22
Phone	821
Title	4
Contact Type	8
Asset Class Coverage	23
Mailing Street	523
Mailing City	20
Mailing State/Province	13949
Mailing Zip/Postal Code	631