FAMILY OFFICE & RIA DATA INTELLIGENCE

10 Ways to Utilize FINTRX to Better Access the Family Office & Registered Investment Advisor (RIA) Market

1. Family Office & RIA Intelligence Optimized For Fundraising

Access to family office and investment advisor data for fundraising has never been easier. Using automation, artificial intelligence and our expansive research team, we put real-time data in your hands to ensure successful outcomes. Find relevant decision-makers in a snap with powerful search filters and queries. Filter through areas of investment interest, AUM, asset flows, intent signals, potential associates and more.

Key Characteristics:

- Access to 375+ advanced search filters & query options
- Our 'Smart Lists' technology keeps your data accurate & up to date
- Custom news alerts & notifications

Learn More

2. Track Asset Allocation Themes

FINTRX empowers clients to monitor where family office and RIA capital is deployed. Our investment trends offer clear insights into recent asset flows within the private wealth ecosystem. Uncover where investment dollars have been allocated historically and intent signals on where future investments may land. Spend your time speaking to investors that have an interest in your funds, deals, products and services.

Key Characteristics:

- Identify where family office & investment advisor capital is flowing
- Track investment activity by sector & size
- Pinpoint investors seeking to allocate
- Explore historical investment trends
- Understand future investment plans

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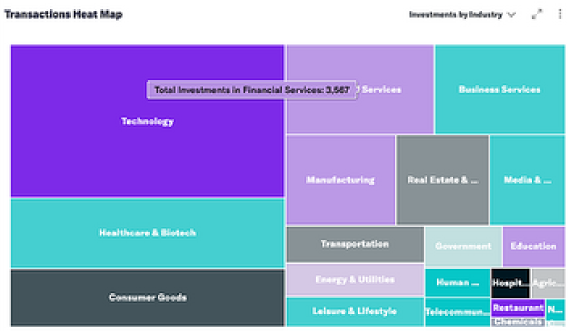

3. Contact Details for 850,000+ Decision-Makers

FINTRX provides expansive contact information on 850,000+ private wealth decision-makers, featuring job titles, direct email addresses, phone numbers, common connections, alma maters, past employment history, brief bios and more. Our comprehensive data on key private wealth individuals ensures a measured approach to making meaningful connections.

Key Characteristics:

- Accurate contact details ensures efficient use of time
- Multiple points of contact for each decision-maker
- Build multi-channel contact strategies
- Thousands of contact updates every month

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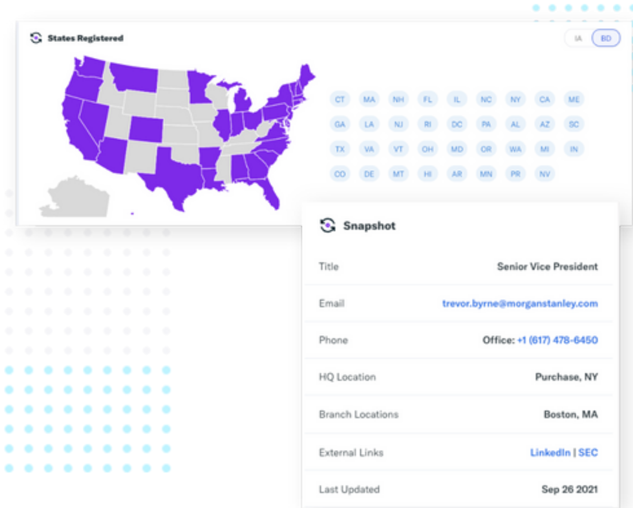
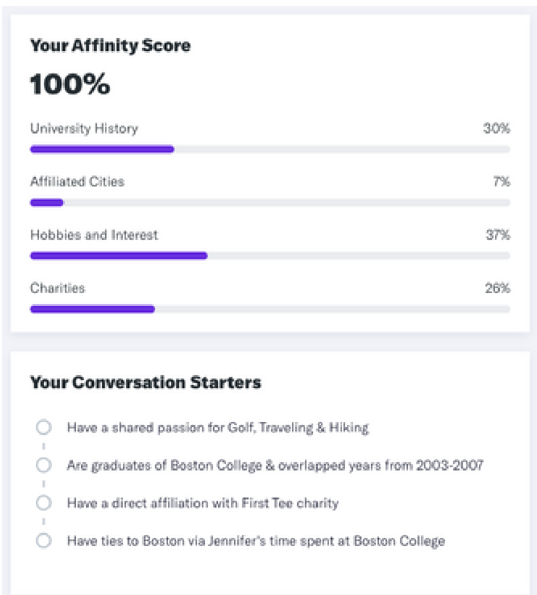


4. Contact Relatability Scores Specific to You

Delivered through our Affinity module, contact relatability scores are designed to humanize your outreach with like-minded investors. Access custom conversation starters, actionable insights to connect, and meaningful intel on your shared commonalities across 850,000+ family office & RIA contacts. Our relatability data arms you with the intel you need to engage prospects.



Quickly parse through investors to determine the individuals you relate to the most. Understand the interests of your prospects outside of work to build better rapport and drive connectivity.

Key Characteristics:

- Uncover shared commonalities with 850,000+ family office & RIA contacts
- Custom conversation starters to build stronger dialogues
- Automatically runs & refreshes every night
- Leverage AI to unlock hidden networking opportunities

[Affinity Video Tour]

[Learn More About Affinity]

5. Custom News Alerts & Notifications

Thanks to our custom news alerts and notifications, users have the ability to customize their alert settings for maximum efficiency and organization across your team. Our custom alert builder allows for a simple point-and-click setup, keeping you dialed into vital information and changes within the private capital markets. Never miss an important touchpoint again.

Key Characteristics:

- Custom scheduling & delivery
- Alerts are sent directly to you or in-app
- Customize notifications based on your current priorities

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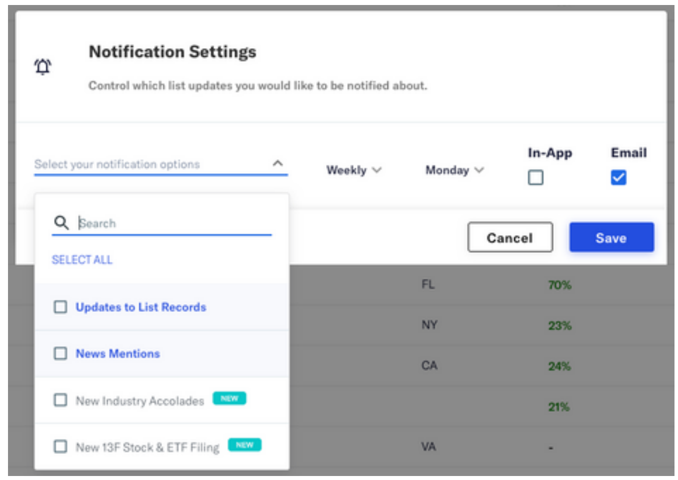
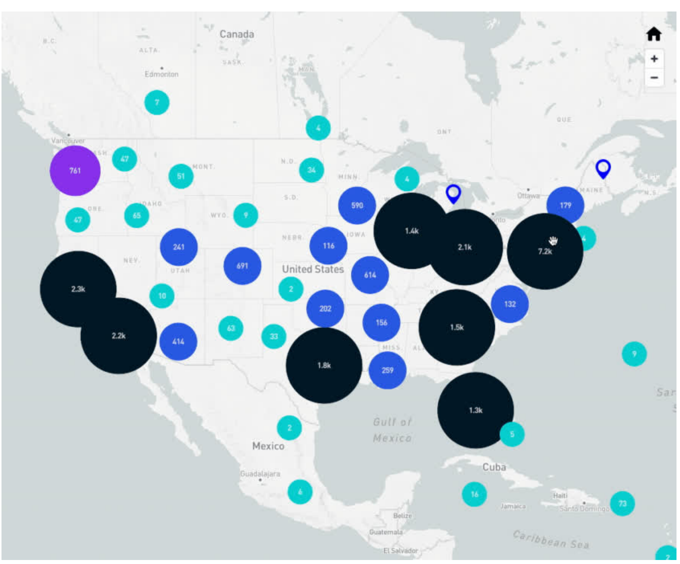


6. Visual Map Search with Street-Level Views

Easily visualize the largest family office and investment advisor database by leveraging our proprietary 'Search Vision' technology. The 'Search Vision' feature is an interactive global map showcasing family offices and registered investment advisor firms down to their street-level view.



Rather than limiting your search to Boston for instance, FINTRX will generate all firms in the area, anywhere from five to 100 miles outside the city. Pinpoint areas of investment interest from a macro to a micro-level view to streamline your roadshow preparation.

Key Characteristics:

- View surrounding family offices & contacts within 100 miles of your search
- Easily create lists of different regions to stay organized
- Visually query down to the street level
- Maximizes your travel plans

7. Expansive Advisor AUM Coverage

Explore investment advisor private funds advised and allocations to fund investments - each with insights into holdings and asset class exposure. Breakdown investments over time, and uncover trends in asset flows and geographic attributions.

Key Characteristics:

- Expansive AUM details to help you map the right families
- Understand the source of wealth behind the curtain of each family

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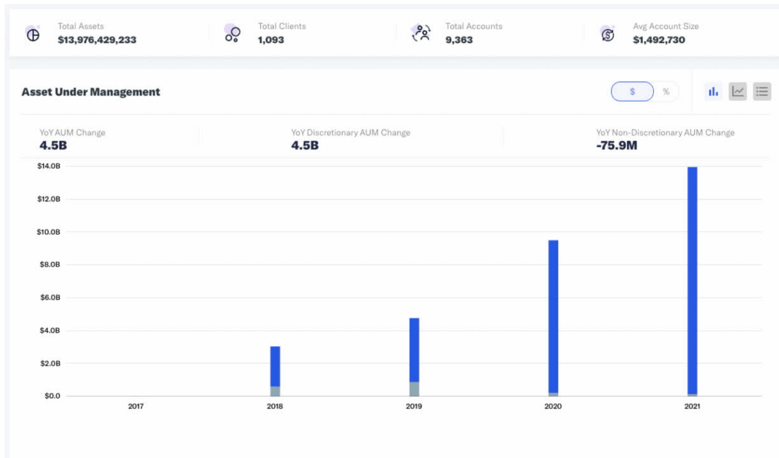

8. Analyze Advisor ETF & Equity Portfolios

Tracking 13F investment advisor portfolios and uncovering key sales opportunities has never been easier. Empower your team with a clear picture of all securities held.

Track changes in ETF and equity holdings over time; Set alerts and notifications to stay current on trends, asset movement and new prospects to target.

Key Characteristics:

- Analyze securities held by sector & industry
- Identify trends in ETFs held
- Filter by millions of security & ETF holdings in seconds
- Build custom cohorts of advisors by their holdings
- Monitor what advisors are selling

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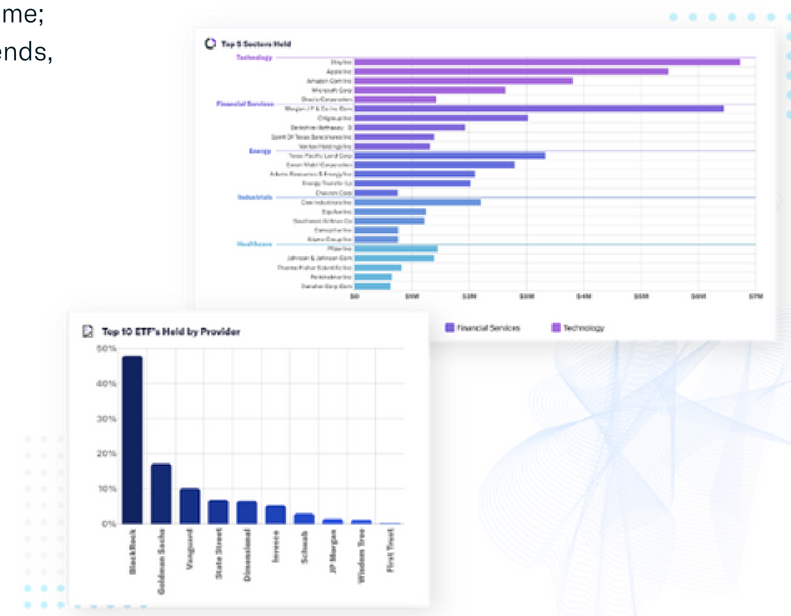


9. Custom Data Feeds & API

At FINTRX, we understand how important it is to build strong, humanized relationships with investors. To facilitate this essential operational need, our engineers have built a CRM that allows users to document and track all interactions with the family offices and contacts that live within our proprietary dataset. Choose from multiple methods of delivery and formats, including Salesforce and HubSpot options.

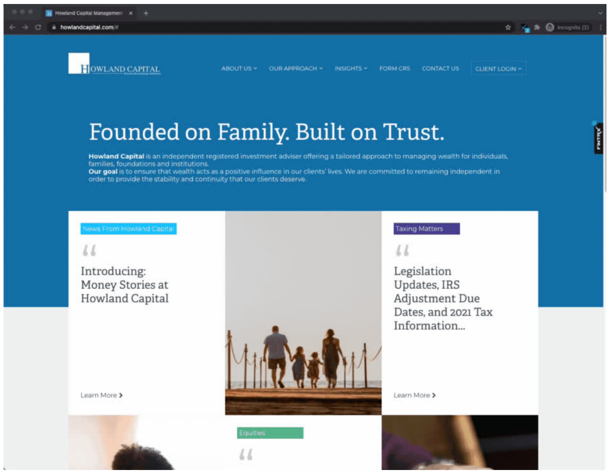
Key Characteristics:

- Build custom file delivery options to power your data needs
- Choose from multiple methods of delivery, formats & options
- Leverage FINTRX data to power your marketing campaigns

[Integrate FINTRX Data Within Your Systems]

10. Google Chrome Extension Plugin

Access FINTRX family office & RIA data directly within your browser. Search and scan any news article or webpage to uncover valuable data - such as key decision makers, recent allocations, M&A activity, new launches, and private investments. With a single click, pull in personalized data to drive better conversations and expand your network. Access common connections, shared universities, full bios, and hobbies and interests of your prospect. Our Chrome Extension will even alert you to any recent news mentions on your prospects.



Using our 'true-sync' technology, any action you take within the extension pairs with your FINTRX account in real time. Mark records as favorites, set alerts, save contacts and firms to lists - even log and create custom properties and tags on the fly.

Key Characteristics:

- Uncover family office & RIA prospects directly within your browser
- Pull in FINTRX data directly from LinkedIn to streamline your workflows
- Updated Emails & phone numbers at your fingertips at all times
- Extract & research family offices & RIA's from news articles

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