

Emerald Advisers



Founded in 1991, Emerald Advisers provides equity and fixed-income portfolio management services for institutional investors and individual investors via separate account management. The firm emphasizes research-driven active asset management and defines

Asset Management | Long Only

itself as a results-driven entrepreneurial organization. Emerald is headquartered in Leola, Pennsylvania with additional offices throughout Pennsylvania. The firm manages approximately \$2.1 billion in AUM as of Q1 2023.

Their Challenge

For those looking to raise capital, the family office ecosystem can be opaque and difficult to infiltrate. Once identifying a specific family office, it can be an extremely arduous task to conduct research and locate up-to-date contact information. It is from this pain-point that Emerald Advisers sought out the FINTRX family office platform.

The firm struggled to identify appropriate family offices and would subsequently spend a lot of their time and resources attempting to research potential investors and the contacts behind them. This led to inefficiency in Emerald's capital-raising efforts.

The Results

Since their adoption of the [FINTRX Private Wealth Data & Research Platform](#), Emerald Advisers has been able to substantially reduce the amount of time spent researching and sifting through family office LPs. This helps ensure they are targeting investors tailored to their distinct prospecting needs.

Not only would the FINTRX platform solve their struggle to identify appropriate family offices but Chief Marketing Officer Mark Shlegel found that the platform had, *"a user friendly interface that also had good quality data."* Mark and the Emerald team initially leveraged FINTRX by using in-depth search tools to quickly identify family offices in 10-12 major metro areas, and the platform helped ensure that their capital-raising efforts and workflow would be efficient and effortless, without sacrificing data accuracy.

Emerald Advisers successfully utilized our vast dataset of **3,700+** investors and **19,500+** family office professionals, to *"cut down on the time spent researching and increase the probability of talking to the right prospects."* Schlegel notes the *"high quality of data and the extensive nature of the investor profiles"*, that include not only all core family office data, but also delve into their specific interests and previous investment activity. This, along with the powerful platform interface, transformed their workflow and allowed their team to focus on what matters - building his family office network with confidence.

"FINTRX allowed us to easily and quickly identify potential targets in the family office space"



Mark Schlegel

Chief Marketing Officer at Emerald Advisers



About FINTRX

FINTRX is a unified data & research platform providing comprehensive data intelligence on **850,000+** family office & investment advisor records, each designed to help asset-raising professionals identify, access & map the global private wealth ecosystem.

FINTRX is a vertically integrated software and data platform that enables wealth professionals, financial institutions and asset management firms to seamlessly map, access and sell into the global family office, broker dealer and registered investment advisor ecosystems. Thousands of users at leading firms trust FINTRX to leverage the power of intelligent data, target the correct firms for capital raising, build stronger relationships, and make better data-informed decisions.

FINTRX's intuitive search engine, proactive alerts, network-expanding capabilities, and warm introduction paths help customers efficiently uncover new opportunities to grow their business and drive successful outcomes.

Access to FINTRX data is delivered via its award-winning cloud-based platform, fully integrated iOS mobile applications, and its many CRM and API connectors, including Salesforce, Navatar, Hubspot, Snowflake, and others. Using automation, artificial intelligence and our expansive research team, we put real-time data in your hands to ensure successful outcomes.

Request a demo below for more information on how FINTRX can simplify your capital raising processes.

Schedule Demo



FINTRX Platform Features

❖ Raise Capital

Using automation, artificial intelligence and our expansive research team, we put real-time data in your hands to ensure successful outcomes.

❖ Unlock Your Network

Uncover your shared commonalities to drive better rapport with **850,000+** decision-makers.

❖ Enrich Your Data

Uncover hidden networking opportunities within your data to drive better prospecting and deliver successful outcomes.

❖ iOS iPhone & iPad Mobile Application

Access FINTRX family office & RIA data directly from your iPhone and iPad. Increase efficiency, identify prospects & bring FINTRX with you on the go.

❖ Market Intelligence

Filter through areas of investment interest, AUM, asset flows, intent signals, potential associates and more...