

Emerald Asset Management

Founded in 1991, Emerald Asset Management provides equity and fixed-income portfolio management services for institutional investors and individual investors via separate account management - the Emerald Mutual Funds and EAGLE ETF portfolios. Emerald is headquartered in Leola, Pennsylvania with additional

Traditional Long Only Manager

offices in King of Prussia, Pittsburgh, and Radnor Pennsylvania, and Cleveland, Ohio. Subsidiary companies include Emerald Separate Account Management, LLC, Emerald Advisers, LLC, Emerald Mutual Fund Advisers Trust, and EmStone Advisers, LLC. Emerald manages approximately \$5.0 billion as of December 31, 2019.

CHALLENGES

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 identify updated contact information. It is from this pain-point that Emerald Asset Management sought out the FINTRX family office platform.

Since their initial FINTRX adoption, Emerald Asset Management has substantially reduced the amount of time spent researching and sifting through family office LP's. This helps ensure they are targeting investors tailored to their distinct prospecting needs.

Upon speaking with Mark Schlegel, *Senior Vice President of Client Relations and Business Development* and multi-year FINTRX seat holder, he outlined their reasons for choosing the FINTRX platform.



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

Mark F. Schlegel

Senior Vice President - Client Relations & Business Development, Emerald Asset Management

RESULTS

Not only would the FINTRX platform solve their struggle to identify appropriate family offices but Mark 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 they could then target when prospecting for investors in the future. Ultimately, they chose the FINTRX platform, as it would ensure their capital-raising efforts and workflow would become more efficient and effortless, without sacrificing data accuracy.

Today, Emerald Asset Management is successfully utilizing our vast dataset of **3,000+** investors and **11,500+** 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.

