

Equinox Partners

Asset Manager | Traditional & Emerging Markets

Equinox Partners is a New York, NY-based financial services firm founded in 1987. The group comprises 11 highly specialized investment professionals aiming to have a low overlap with traditional markets. Equinox Partners differentiates itself by specializing in emerging markets such as precious metals mining with exposure to other niche industries.

Challenges

Prior to joining the FINTRX community, Equinox Partners had a common desire to source high-quality information on its primary target market, the private family office landscape.

Daniel Schreck, Partner at Equinox Partners, described his previous workflow to be *“elusive when trying to source new, high-quality family office investors”*.

Given the need to gain access to actionable family office data, Schreck sought out the FINTRX data and research platform to gain credible insight and access into 3,300+ single and multi-family offices as well as the nearly 19,000 contacts that work within them.

Results

Since joining FINTRX last year, Equinox Partners has streamlined its family office intelligence and continues to strategize its approach to the market.

With over 22,200+ unique family office records, Equinox can now uncover a firm’s past transactions, preferred asset classes, areas of investment interest, AUM, asset flows and intent signals, making it much easier to find suitable prospects.

Additionally, our custom alerts help keep the Equinox team up-to-date and on the same page, allowing for increased transparency and greater success down the line.

“A great culture sourcing quality family offices within an elegant online platform - I love it.” - Daniel Schreck - Partner, Equinox Partners



“There are only so many hours in the day, so optimizing productivity in our seat means having the right marketing tools and using them the right way. The search, alerts, profiles, contacts, etc. that are part of the FINTRX platform fits that bill. We can set our criteria, come to work, check our emails, see which family office is interesting, and then call or email them. That’s a good tool.”

Daniel Schreck

Partner, Equinox Partners

