

# FINTRX Raises \$9M Series A to Accelerate Growth of leading Family Office & Registered Investment Advisor Data Intelligence Platform



## Series A Funding Announcement



November, 29, 2021

BOSTON, MA--FINTRX, a leading resource for Family Office & Registered Investment Advisor commercial intelligence, today announced it has raised \$9 million for a minority stake in its Series A round of funding. The round was led by Founder & CEO of Definitive Healthcare ([Nasdaq: DH](#)), [Jason Krantz](#), who successfully took his company public in September of this year. The round also received participation from Definitive Healthcare Chief Revenue Officer [Joe Mirisola](#). [Houlihan Lokey](#) acted as financial advisor to FINTRX on the transaction.

FINTRX's software-as-a-service (SaaS) platform empowers its customers to map, access and sell into the complex and fragmented world of Family Offices and Registered Investment Advisors. FINTRX customers leverage comprehensive data, paired with powerful search functionality and proactive alerts, that allows them to efficiently identify and access new opportunities within the rapidly expanding private wealth ecosystem.

“Over the last five years FINTRX has built a world class information resource to help our clients sell more effectively into the family office & registered investment advisor market. With this round of funding, we will continue to invest in the product and commercial organization to take the company to the next level, said FINTRX Founder and CEO [Russ D'Argento](#).

“The FINTRX platform is an amazing platform that is truly differentiated in the market. The company has combined best-in-class data with sophisticated data science and artificial intelligence to provide their clients with the strategic and tactical insight needed to succeed in the competitive financial market,” added incoming FINTRX Board member [Jason Krantz](#). “This product is a game changer for the industry.

Investment professionals use FINTRX to pinpoint investors with a high probability of interest in their products and services. Furthermore, clients leverage the platform to highlight overlaps within their professional network to determine their best path forward to build meaningful rapport with their prospects.

“With this investment, FINTRX will build on its strengths to become the premier provider of Family Office & Registered Investment Advisor commercial intelligence. I am very excited to partner with Russ and his team to help them scale this business and put the power of FINTRX into more client's hands,” said incoming FINTRX board member [Joe Mirisola](#).

FINTRX offers a myriad of tools within its platform to drive more efficient market research and fundraising efforts. For example, customers can track investment activity, set alerts on future investments that meet their specifications, monitor new investor opportunities, scour news mentions, and leverage the FINTRX Affinity algorithms to uncover their personal relatability to more than 800,000 finance professionals.

“From day one, FINTRX has been acutely focused on fusing technology and data to solve complex problems for our customers,” said D'Argento. “Delivering the right information at the right time, allowing our customers to make real time actionable decisions remains priority number one. This investment will allow us to move faster and deliver additional data modules and software to our customers.

## Funding from the Series A will be used to:

- Accelerate the build and release of additional modules & product features
- Significantly expand FINTRX's growing business development & client success teams
- Expand FINTRX's data science and data intelligence teams
- Bolster the firm's engineering and data delivery offerings

## Intelligent Family Office & RIA Data

### Custom Alerts & Notifications

Monitor your prospects with news mentions, job changes, promotions, and more

### Smart Lists

Leverage our smart algorithms to keep your lists accurate, current, and growing

### Investment Insight

Track previous investments, current interests, average deal size, private funds advised & more

### Unified Platform Experience

FINTRX offers a single source for all your private wealth data intelligence

### Data Feeds & Export Options

Access FINTRX data in our cloud based platform, or natively in your systems via feeds or downloads

### Prospect Management

Log notes, set tasks, assign tags, and custom properties on your top prospects

### Personal Network Visibility

Our Affinity feature uses millions of data points to present networking opportunities

### Territory & Lead Management

Segment 800K+ prospects by location, size, internal owner, and more

