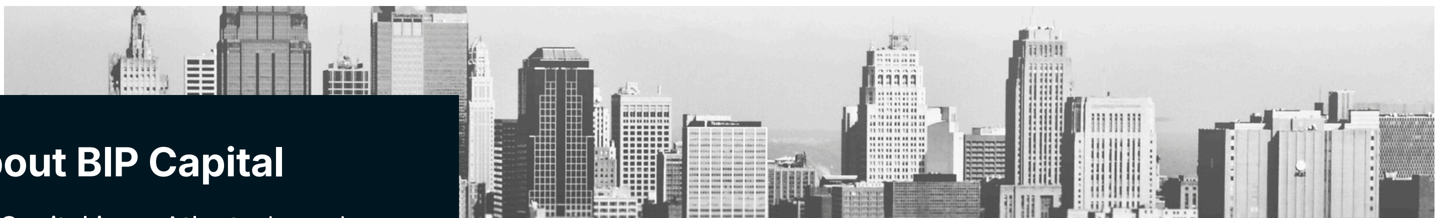
FINTRX

CASE STUDY | 2025

How BIP Capital Leverages FINTRX to Scale RIA & Family Office Capital Raising



About BIP Capital

BIP Capital is an Atlanta-based private markets investment platform providing access to venture capital, growth equity, and private credit strategies. With a strong focus on technology and tech-enabled businesses, the firm invests across multiple stages, with particular emphasis on opportunities in the U.S. South, Southeast, and Midwest. Through its venture, evergreen, and credit structures, BIP Capital delivers diversified private market exposure designed to complement traditional portfolios.

Managing approximately $1.6B across its investment strategies, BIP Capital partners with RIAs and family offices to deliver differentiated access to private investments. Supported by a purpose-built technology and operations infrastructure, the firm streamlines advisor onboarding, subscriptions, and servicing—positioning BIP Capital as a long-term, partner-first resource for wealth managers navigating private markets.

BIP CAPITAL

Challenges

Before adopting FINTRX, BIP Capital faced a familiar set of hurdles shared by many managers expanding into the RIA and family office channels. The team needed a single, reliable source of truth for private wealth data, one that could keep pace with their data-driven process, support ongoing fundraises, and eliminate time lost to chasing incomplete or inaccurate information.

- **Hard to Find Truly Accurate Data:** Locating reliable, up-to-date information on RIAs, SFOs, and related private-wealth segments was difficult. Many providers emphasized volume over accuracy, forcing teams to double-check records and slowing the outreach process.

- **No Single Source Tailored to Wealth Channels:** The team needed one platform that actually understood and served the wealth management, SFO, and RIA ecosystem. Fragmented data across providers made it challenging to see the full picture of a firm or allocator.

- **Inefficient Prospecting Workflows:** Without centralized, trustworthy intelligence, capital-raising efforts risked becoming inefficient, more time spent cleaning and validating lists, less time engaging the right RIAs and family offices with well-aligned strategies.

Why They Chose FINTRX

BIP Capital selected FINTRX for its channel-specific focus and data accuracy. Rather than offering broad but unreliable datasets, FINTRX provides precise, curated intelligence built specifically for the wealth management, RIA, and single family office ecosystem, aligning directly with the firm's process-driven philosophy. The team also values FINTRX's people and culture: responsive support from its Client Success team, familiar faces at industry events, and a clear commitment to continuous product innovation.

Results & Impact

Since embedding FINTRX into its capital-raising workflow, BIP Capital has refined how it identifies and engages private-wealth allocators. FINTRX functions as a core resource for institutional sales, supporting smarter list creation, deeper allocator analysis, and broader reach across RIAs, single-family offices, and increasingly endowments and foundations as new funds are launched.

- **Accurate, Channel-Specific Intelligence:** FINTRX provides BIP Capital with a clear, 360-degree view of private-wealth decision-makers. Trusted, actionable data allows the team to spend less time validating information and more time focused on high-value conversations and strategic outreach.

- **Pinpointed RIA Targeting with 'Average Client' Data:** The "average client" field gives BIP Capital a sharper way to align their evergreen venture and private credit strategies with the clients RIAs actually serve. Instead of relying on firm-level AUM alone, the team can zero in on RIAs whose client profiles best fit their offerings.

- **Powering More Focused & Efficient Outreach:** FINTRX helps surface meaningful insights and zero in on high-potential targets, quickly and effectively. Whether preparing for a new fund launch or refining outreach lists, the platform underpins their broader RIA and private-wealth channel strategy.

- **Hands-On Support & Steady Innovation:** Through consistent check-ins and feature walkthroughs, the team stays up to date on new capabilities, including AI-driven intelligence. The responsiveness and long-tenured FINTRX staff reinforce a true strategic partnership, not just a vendor relationship.

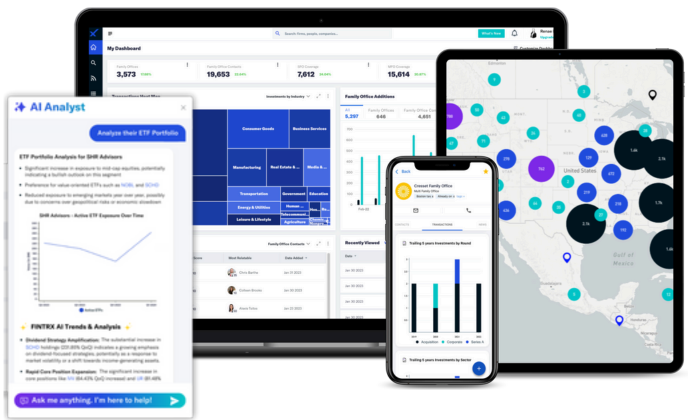
"The accuracy of the data makes my job a lot easier, and it's why I view FINTRX as the industry leader in wealth-management and SFO data — precise, reliable, and delivered in a way that's actually consumable."

Phil Davidson

Managing Director of Institutional Sales,
BIP Capital

About FINTRX

AI-Driven Private Wealth Intelligence That You Can Trust



FINTRX is the leading AI-powered private wealth intelligence platform, delivering expansive and actionable data on RIAs, broker-dealers, family offices, wealth teams, as well as endowments and foundations. With AI built into the core of our platform, FINTRX continuously aggregates, cleans, and enriches private-wealth data, providing unmatched accuracy, freshness, and depth.

Our technology transforms raw information into insights firms can act on: who to target, when to reach out, and how to approach them. This intelligence powers capital raising, fund distribution, advisor recruiting, and M&A strategy for firms that demand more than static lists or legacy databases.

As enterprises increasingly move away from older providers, FINTRX stands apart with wide data coverage, precise accuracy, and advanced AI that delivers real relationship intelligence at scale, helping clients win more business and drive strategic growth.

GET STARTED TODAY

Fund Distribution

Empower your ETF, mutual fund & product distribution efforts with actionable insights tailored to your goals. Uncover trends, analyze holdings, optimize your distribution strategies, and identify key market opportunities.

Learn More

Asset Raising

Target the right investors, personalize outreach & accelerate capital-raising with data on 4,000+ family offices, including investment preferences, direct investment activity, and key investment decision-makers.

Learn More

Advisor Recruiting and M&A

Identify high-potential advisor teams, assess recruitment opportunities, and craft strategic pitches. Perfect for targeting wirehouse teams, independent RIAs, or wealth management entities with data-driven insights to enhance your recruiting and acquisition efforts.

Learn More