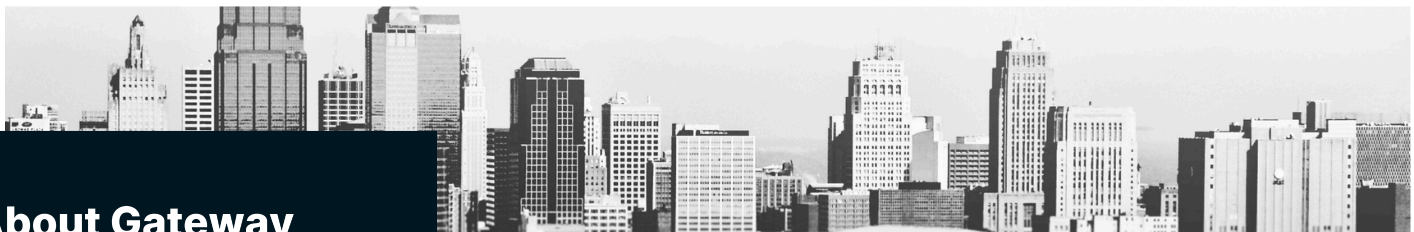
CASE STUDY | 2025

How Gateway Financial Partners Streamlines Advisor Engagement with FINTRX



About Gateway Financial Partners

Gateway Financial Partners is an independent financial services firm headquartered in Glastonbury, Connecticut. Founded in 1994, Gateway serves as a scaled service organization for more than 170 independent financial advisors across 28 states. Acting like a cooperative, the firm provides advisors with the infrastructure they need to stay independent, accelerate growth, and focus on client value.

Gateway's mission is to empower advisors who want to remain independent while scaling their practices faster and more efficiently. By removing the burden of running day-to-day business functions, Gateway allows advisors to concentrate on growth, client relationships, and long-term planning.

Challenges

Before turning to FINTRX, Gateway's business development team struggled to identify and engage Registered Investment Advisors (RIAs) effectively. Previous systems produced static, outdated lists, forcing the team to cobble together data from multiple sources or even rely on manual Google searches or spreadsheets. For a lean team tasked with growth, outreach often felt reactive and inefficient.

- **Limited RIA Visibility:** With no centralized resource, the team lacked a clear view into RIAs nationwide, making it difficult to uncover opportunities or track activity across states, broker-dealers, and firms.
- **Fragmented Data:** Records were scattered across multiple sources, often incomplete or outdated, undermining confidence in accuracy and slowing outreach.
- **Inefficient Tools:** The systems in place were clunky and unintuitive, forcing the team to spend more time wrestling with interfaces than actually targeting and engaging prospects.
- **No CRM Integration:** Without a direct HubSpot connection, lists remained static and disconnected. This often led to constant manual updates and duplicate data entry.

Why They Chose FINTRX

Gateway turned to FINTRX on the recommendation of a trusted peer. The combination of an intuitive interface and high-quality, AI-powered data stood out immediately, offering a streamlined experience unlike the 'Stone Age' systems they'd used before. The HubSpot integration proved an unexpected differentiator, syncing living, breathing data directly into campaigns and keeping it current automatically. Combined with hands-on onboarding support, FINTRX quickly became central to Gateway's business development process.

Results & Impact

With FINTRX in place, Gateway has reshaped its approach to advisor engagement, moving away from reactive prospecting toward a repeatable, event-driven growth strategy. The team now uses FINTRX to build precise event lists, sync them directly into HubSpot, and execute targeted outreach campaigns across the country.

- **Sharper RIA Targeting & Time Savings:** FINTRX gives Gateway clear visibility into the right firms and contacts, enabling the team to quickly build precise, event-specific lists across multiple states while eliminating hours of manual research.

- **Seamless HubSpot Synchronization:** Living lists now flow directly into HubSpot campaigns, ensuring data stays accurate, actionable, and aligned with automation. *"The HubSpot integration was a game-changer. Our lists are now living and breathing inside our CRM, automatically syncing and driving campaigns,"* said Mike Kitzman, *Chief Engagement Officer at Gateway Financial*.

- **Proven Event ROI:** Gateway has already recruited three new advisors through FINTRX-powered events, with wins that, as Mike noted, have *"paid for themselves, really."*

- **Scalable Growth Model:** With 24 national events planned for 2026, Gateway now has a repeatable framework to attract, nurture, and convert advisors at scale.

"FINTRX sits on top of good data with the most intuitive interface I've ever used. It's saved us significant time and brought consistency to our outreach, turning prospecting from a challenge into a strength. Now, it's become central to how we engage advisors."

Mike Kitzman
Chief Engagement Officer,
Gateway Financial Partners

About FINTRX

AI-Powered Data Intelligence on RIAs, Family Offices, Advisor Teams, Broker-Dealers & more

FINTRX is the leading private wealth intelligence platform, offering the industry's most expansive and up-to-date data on family offices, investment advisors, broker-dealers, wealth teams, and more.

Powered by [industry-leading AI](), FINTRX turns data into actionable intelligence, helping firms distribute funds, raise capital, and identify advisor M&A and recruiting targets - all designed to drive strategic growth.

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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.

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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.

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Advisor Recruiting & 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.

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