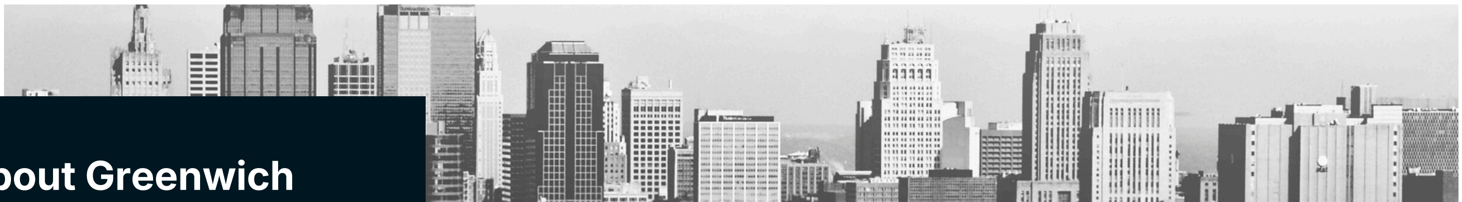
CASE STUDY | 2026

How Greenwich Private Equity Leverages FINTRX to Target Family Offices & Streamline Capital Raising



About Greenwich Private Equity

Greenwich Private Equity is a private markets investment firm founded by a team of seasoned professionals with decades of experience across capital markets, real estate development, finance, and technology. The firm provides accredited investors access to proprietary private equity opportunities with a focus on capital preservation and long-term growth.

Greenwich Private Equity invests across several sectors including ultra-high-end residential real estate development, aviation, entertainment and media, and transformative technologies such as AI-related opportunities. Leveraging the team's institutional investment and operating experience, the firm partners with family offices, RIAs, and other private wealth investors seeking differentiated access to private markets.

GPE
GREENWICH PRIVATE EQUITY

Challenges

For Greenwich Private Equity, raising capital across the private wealth channel requires clear visibility into the investor landscape. Prior to FINTRX, gaining that level of insight, particularly within the family office segment, was difficult without centralized, reliable intelligence.

- **Limited Transparency Across Family Offices:** Unlike RIAs, family offices operate with far less public visibility. This made it harder to identify relevant firms, understand their investment focus, and determine which family offices might be aligned with Greenwich Private Equity's strategies.

- **Identifying the Right Contacts Within Each Firm:** Even after identifying potential firms, determining who evaluates opportunities and makes investment decisions remained a challenge. Without clear contact-level intelligence, connecting with the appropriate individuals required additional research.

- **Avoiding Broad, Ineffective Outreach:** Without visibility into potential connections, outreach risked becoming broad and impersonal. For a firm focused on building meaningful investor relationships, the ability to approach the right people with context was critical.

- **Maintaining an Efficient Capital-Raising Workflow:** With capital raising serving as a core responsibility across the team, investor research, screening, and outreach needed to move efficiently so more time could be spent engaging relevant investors.

Why They Chose FINTRX

FINTRX stood out for the depth and quality of its family office intelligence, including detailed insight into contacts, investment strategies, and allocation preferences. Combined with powerful screening capabilities and a seamless HubSpot integration, the platform allows the Greenwich Private Equity team to move efficiently from investor research to outreach. Managing Director Steven McDermott also highlighted the responsiveness of the FINTRX Client Success and Integrations teams, noting that the support has been especially valuable.

Results & Impact

FINTRX now serves as a central resource within Greenwich Private Equity's capital-raising workflow, helping the firm identify investors, research prospects, and prepare for outreach across family offices and RIAs.

- **Identifying Investors Not Previously on the Firm's Radar:** Through powerful searches, Greenwich Private Equity has surfaced relevant firms and contacts that were previously unknown to the team. In several instances, the information within the FINTRX database helped initiate relationships that otherwise may not have been discovered.

- **Targeted Investor Screening:** Granular filtering capabilities allow the firm to screen potential allocators based on factors such as asset class exposure, investment strategy, and openness to emerging managers, helping narrow a broad universe into a more focused pipeline of relevant prospects.

- **Identifying Paths Into Target Firms:** Using tools such as FINTRX Relationship Path, Steven can uncover potential connections to contacts within target firms, helping guide outreach and reduce reliance on broad cold outreach.

- **Faster Outreach Through HubSpot Integration:** The FINTRX–HubSpot integration allows the team to move directly from screening investors to accessing CRM records and sending outreach, completing tasks in minutes that previously required navigating multiple platforms.

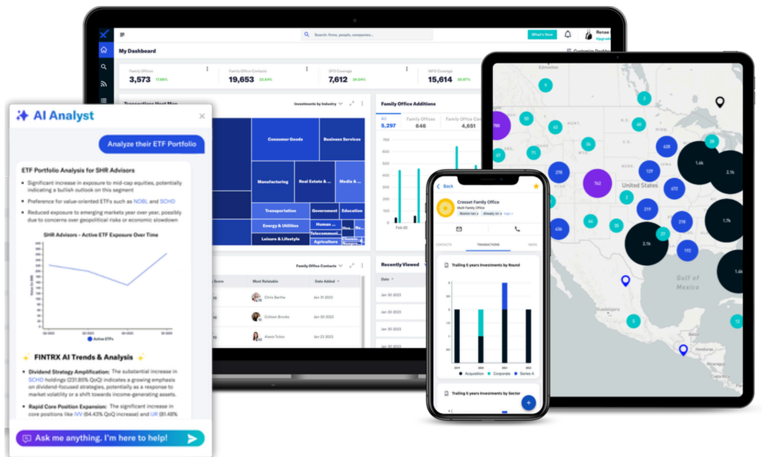
- **Stronger Preparation & Workflow Efficiency:** FINTRX is consistently used to review intelligence on both new prospects and existing relationships before outreach begins, providing additional context on firms, contacts, and potential connection paths. With research, screening, and CRM integration connected in a single workflow, tasks that once took 30–60 minutes can now be completed in minutes.

"If you're focusing on RIAs and family offices, [FINTRX] is absolutely the go-to intelligence provider... I have it up on one of my monitors all day long. I'm able to get through in a matter of minutes things that used to take me half an hour or an hour. It's hard to imagine doing it without — it's like you're flying blind if you don't have it."

Steven McDermott
Managing Director at
Greenwich Private Equity

About FINTRX

AI-Driven Private Wealth Intelligence That You Can Trust



[FINTRX](#) is the leading private wealth intelligence platform, offering the industry's most expansive and up-to-date data on registered investment advisors, broker-dealers, wealth teams, family offices, endowments, and foundations.

Powered by [industry-leading AI](#), FINTRX helps firms distribute funds, raise capital, recruit advisors, identify M&A targets, and drive strategic growth.

FINTRX now provides access to data and intelligence covering 850,000+ financial firm and contact records, including more than 4,400 family offices and 44,000 RIA and broker-dealer firms.

To learn more or request a trial, scan the QR code below.

[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.

[Asset Raising](#)

Target the right investors, personalize outreach & accelerate capital-raising with data on 4,400+ family offices, including investment preferences, direct investment activity, and key investment decision-makers.

[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.

[Lead Generation](#)

Instantly surface RIAs, broker-dealers, and family offices that align with your product or service, eliminating wasted outreach.