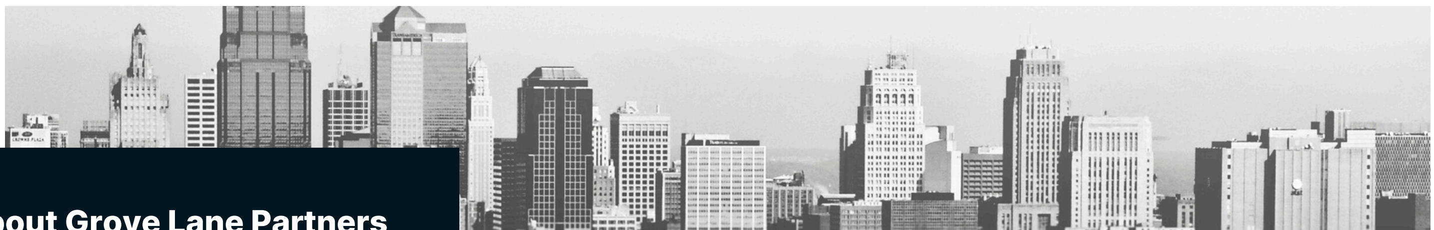
FINTRX

CASE STUDY | 2025

How Grove Lane Partners Leverages FINTRX to Scale Private-Wealth Capital Raising



About Grove Lane Partners

Grove Lane Partners is the individual-investor distribution arm of GCM Grosvenor, formed through a strategic joint venture to broaden access to institutional-quality alternative investments. GCM Grosvenor is one of the world's leading alternative investment firms with a 50+ year track record across private markets, specializing in private equity, infrastructure, real estate, credit, and absolute-return strategies.

Grove Lane expands this expertise into the private-wealth channel, delivering sophisticated private-market solutions to RIAs, family offices, and high-net-worth advisors. The team blends deep advisor-channel experience with the scale, credibility, and resources of a global alternatives platform.

Grove Lane Partners

GCM GROSVENOR

Challenges

Grove Lane needed to build a targeted, data-driven wealth distribution motion capable of identifying the right decision-makers across the RIA and family office ecosystem. Traditional databases offered incomplete coverage and lacked the depth required to confidently find the correct contacts and personalize outreach at scale.

- **Identifying the Right Contacts:** The team needed verified decision-makers to avoid wasted outreach and accelerate early traction.
- **Scaling Outreach with a Lean Team:** With a lean distribution team, efficiency and precision were essential.
- **Limited Visibility from Existing Tools:** Other tools provided only partial insight into the market, but lacked the breadth and depth needed to support private-equity fundraising across the broader advisor universe.
- **Building a High-Quality CRM Foundation:** With HubSpot as the system of record, Grove Lane needed reliable, accurate contact intelligence, without clutter, duplicates, or wasted activity.

Why They Chose FINTRX

FINTRX provides Grove Lane with the private-wealth intelligence, coverage, and precision they need to scale their outreach quickly. The platform's depth of diligence, exportable one-pagers, firm insights, and verified contacts gives the team a clear, actionable view of their advisor universe. Combined with seamless HubSpot enrichment, FINTRX serves as a natural extension of their internal systems, helping Grove Lane execute targeted, informed outreach as they expand their distribution efforts.

Results & Impact

FINTRX has become a foundational component of Grove Lane's advisor-engagement strategy, enabling the small but fast-growing team to operate with the efficiency and precision of a mature wealth-distribution unit.

- **Accelerated Advisor Coverage:** FINTRX expands Grove Lane's reach across the RIA and family-office ecosystem, providing deeper visibility into the advisors and decision-makers evaluating private-market strategies.
- **More Targeted, Effective Outreach:** Human-verified contacts and detailed one-pagers help the team reach the right decision-makers the first time, improving conversation quality and reducing wasted effort.
- **Stronger Alignment Between Products & Prospects:** Firm-level insights allow Grove Lane to tailor outreach to allocator interests, making conversations more relevant and timely.
- **A Scalable CRM Foundation for a Lean Team:** FINTRX enriches HubSpot with clean, accurate contact data, helping a lean, fast-growing team operate with the efficiency of a mature distribution organization.

"My favorite feature has been the ability to pull down one-pagers on every firm, every family office, every RIA, and figure out who the best people for us to contact are… It's a fantastic service provider, technology provider, and extra due diligence for you as an asset manager… another layer of a CRM for you."

Ryan Chapman

President at Grove Lane Partners,
a GCM Grosvenor affiliate

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.

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 & 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