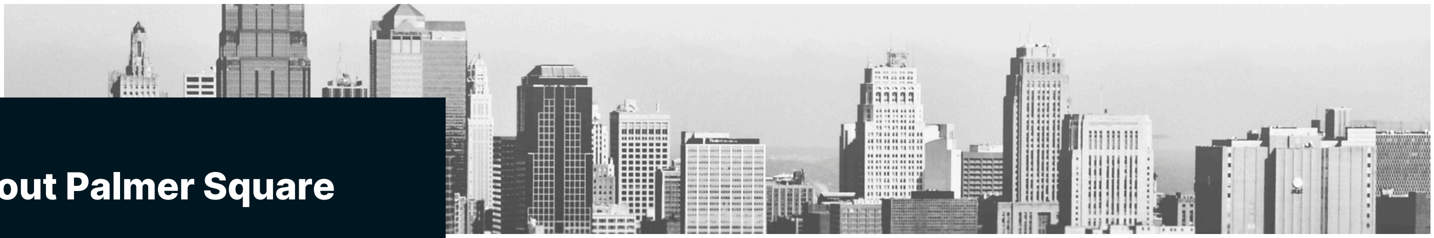
CASE STUDY | 2025

How Palmer Square Uses FINTRX to Power Advisor Prospecting & Capital-Raising Efforts



About Palmer Square

Founded in 2009, Palmer Square Capital Management oversees more than $36.6 billion in fixed income and credit investments for a range of institutional and high-net-worth investors. The firm uncovers absolute and relative value opportunities across corporate and structured credit markets.

As a boutique credit manager, Palmer Square brings deep global credit expertise to its opportunistic credit, CLO debt, income/short duration, and structured credit issuance strategies. Its diverse client base and proven performance track record position the firm as a trusted partner to allocators and advisors nationwide.

PALMER SQUARE CAPITAL MANAGEMENT®

Challenges

Before adopting FINTRX, Palmer Square faced the common challenge of precision prospecting: knowing which RIAs and family offices had a demonstrated appetite for the firm's suite of credit and ETF solutions. Traditional databases lacked sufficient data depth and usability, slowing outreach and limiting their ability to scale meaningful conversations.

- **High-Fit Prospecting:** The team needed to identify advisors actively allocating to ETFs, private funds, or private credit - audiences most likely to engage with Palmer Square's strategies.
- **Data Depth Gaps:** Without insights into portfolio holdings, competitive analysis and product positioning were largely anecdotal.
- **Accelerated Onboarding:** With a growing distribution team, a user-friendly platform was vital to help new hires contribute immediately without weeks of training or acclimation.

Why They Chose FINTRX

Palmer Square chose FINTRX for its depth of data, intuitive design, and ease of use. Compared to other databases, FINTRX offers richer visibility into advisor behavior and firm characteristics while remaining simple to navigate. The team found the 13F screening especially valuable, uncovering which ETFs firms hold and how those align with Palmer Square's strategies, enabling data-driven conversations from the start. Beyond the platform, FINTRX's client success team provides proactive, hands-on support, verifying contacts, refreshing firm data, and sourcing missing information within 24–48 hours to keep every campaign accurate and up to date.

Results & Impact

With FINTRX, Palmer Square transforms data into action, targeting ideal prospects with precision, securing more high-quality meetings, and turning outreach into measurable capital-raising results.

- **13F-Driven Targeting:** The ability to view ETF and fund holdings gave the team real competitive intelligence, shaping messaging that resonates with advisor portfolios and current allocations.
- **Accelerated Activity:** Meeting volume *"drastically increased,"* putting Palmer Square in front of more decision-makers across RIAs and family offices than ever before.
- **Expanded Product Distribution:** FINTRX helps drive capital across multiple vehicles — mutual funds, private funds, and the firm's growing ETF lineup—by identifying the right channels for each.
- **White-Glove Support:** Real-time customer service ensured data accuracy and confidence in every outreach effort, freeing the team to focus on relationship building rather than research cleanup.

"The real results we've seen are that our activity and number of appointments have drastically increased, putting us in front of more decision-makers than ever before. We've had countless success stories raising capital, and now with our ETFs, we're getting in front of firms we were never able to reach before."

Jarett Atkins

Executive Director, Business Development
Palmer Square Capital Management

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