CASE STUDY | 2025

How Peachtree Group Leverages FINTRX to Streamline Investor Prospecting & Drive Private-Debt Growth

About Peachtree Group

Founded in 2007, Peachtree Group is a diversified investment firm focused on commercial real estate and credit investments. Headquartered in Atlanta, Georgia, the firm has executed hundreds of transactions across acquisition, development, and lending, managing more than $13.9 billion in real estate asset value and $4.9 billion in capital.

Peachtree's vertically integrated platform provides end-to-end oversight, from construction and property management to asset and capital stewardship, ensuring investor capital is optimized for sustainable, long-term growth. Its Capital Markets team connects private and institutional investors with tailored real estate and private-debt opportunities nationwide.

Challenges

Peachtree Group faced mounting complexity in managing data across multiple platforms while expanding its investor base. They needed to simplify prospect discovery and consolidate workflows under a single, efficient system.

- **Fragmented Systems:** Investor intelligence was spread across ten different software tools, creating duplication and gaps in CRM visibility.
- **Travel Planning Efficiency:** With team members frequently on the road, identifying high-potential RIAs and family offices near target geographies required hours of manual research.
- **Alternative Strategy Focus:** The team wanted to segment investors by asset class interest, particularly private debt, a growing pillar of Peachtree's capital markets strategy.

Why They Chose FINTRX

Peachtree selected FINTRX for its ability to centralize fragmented data and deliver intuitive, high-speed prospecting. The platform's ease of use and powerful filtering capabilities enable team members to identify advisors most compatible with Peachtree's private credit and real estate offerings, without extensive training or setup. Equally impactful is FINTRX's AI-powered search, which allows users to generate targeted lists based on travel itineraries or specific metro areas in seconds. For a firm that thrives on face-to-face relationship building, this feature turned hours of prep time into a few simple clicks.

Results & Impact

FINTRX has become a daily part of Peachtree's workflow, allowing the team to move faster, qualify better, and engage investors more strategically.

- **New Investor Relationships:** Through FINTRX, the team identified a Northeast family office that developed into a multi-deal partnership, demonstrating the long-term value of precise, data-driven targeting.
- **AI-Enhanced Travel Efficiency:** Automatically built lists of investors within 25 miles of target cities, transforming business travel into productive, pre-qualified meetings.
- **Focused Alt Investment Filters:** Leveraged filters to isolate firms allocating to private debt, enabling sharper segmentation and tailored outreach.
- **Quick Firm-wide Adoption:** 10+ users across the Capital Markets team now rely on FINTRX daily, using one system to manage relationships and uncover new opportunities with ease.

"I use it [FINTRX] every day along with the 10 others on my team... It's a tool that makes our lives easier. FINTRX lets you prospect far more effectively than any other platform I've used. And eventually, after building the relationship, we ended up closing on a couple of deals and having a new investor at our firm, which was fantastic."

Victor LeBlanc
Managing Director, External Wholesaler
Peachtree Group

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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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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