

CASE STUDY | 2025

How Pure Financial Enhances M&A and Advisor Recruiting with FINTRX



About Pure Financial

Founded in 2007, Pure Financial Advisors is a fee-only Registered Investment Advisor (RIA) with roughly \$9 billion in assets (\$8.998B AUM and \$30M AUA as of 5/25/2025). The firm provides fiduciary-based financial planning and investment management services to the mass affluent, typically clients with \$500K to \$5M in investable assets.

Operating under a centralized model, Pure equips its advisors with robust internal support teams across client service, tax planning, investment management, and corporate development. With a focus on organic growth complemented by select acquisitions, the firm continues to expand nationally while staying rooted in a planning-first, client-centric mission.

Challenges

As Pure Financial expanded its advisor recruiting and M&A efforts, the team needed a more scalable and efficient way to identify, evaluate, and engage with high-potential advisors and firms. Their prior process leaned heavily on manual research and outdated spreadsheets, creating unnecessary friction and limiting efficiency.

- ◆ **Inefficient Prospecting Workflows:** Manual outreach and list-building using legacy data sources made it difficult to operate at scale.
- ◆ **Disconnected Outreach Tracking:** Without a centralized system to manage early-stage outreach, communication history often lived in scattered spreadsheets, making it tough to track engagement and follow-ups over time.
- ◆ **Specialized Recruiting Needs:** Pure's advisor recruiting strategy is highly selective. Advisors are generally required to hold a CFP®, CPA, CFA, or have five+ years of planning experience, making it challenging to identify qualified candidates across multiple markets.
- ◆ **Outdated or Incomplete Data:** Previous data sources lacked depth and consistency, often requiring validation through multiple platforms, slowing down decision-making.

Why They Chose FINTRX

FINTRX was introduced to Pure Financial by an industry peer and quickly proved to be the right fit for their [advisor recruiting and M&A](#) goals. The platform's advanced filtering tools, real-time firm data, and comprehensive ADV integration made it easy to identify and assess high-quality targets. From on-the-go meeting prep to pre-event outreach and regional list-building, FINTRX gave Pure the intelligence and flexibility to streamline outreach and scale its efforts more efficiently.

Results & Key Benefits

Since adopting FINTRX, Pure Financial has transformed how it sources and engages prospective advisors and firms. The platform has become a core component of its recruiting and M&A toolkit.

- ◆ **Streamlined Research & Outreach:** FINTRX replaced manual prospecting with real-time data, dynamic filters, and enriched firm profiles. Tasks that once took hours in spreadsheets now take minutes, allowing the team to quickly surface high-fit prospects by geography, AUM, credentials, and more.
- ◆ **Smarter, Real-Time Meeting Prep:** The [FINTRX mobile app](#) enables fast access to firm and advisor intelligence from anywhere, helping Pure prepare more effectively for meetings and events.
- ◆ **Targeted Event Outreach:** By enriching attendee lists in FINTRX, Pure is able to prioritize the most relevant firms ahead of events and deploy targeted outreach campaigns that drive higher-quality conversations and follow-ups.
- ◆ **Centralized Pipeline Visibility:** FINTRX offers a single hub for managing lead lists and tracking outreach, improving visibility into engagement activity without relying solely on CRM or disconnected spreadsheets.
- ◆ **Scalable, Strategic Growth:** With a more efficient and informed approach to sourcing opportunities, FINTRX helps Pure Financial Advisors scale its recruiting and M&A strategy while maintaining its rigorous standards and long-term growth objectives.

“Almost every meeting I go into, I’m on FINTRX - looking up the firm, learning everything I can. It’s become part of my process. It’s like a cheat code. If you’re not using it, you’re behind.”



Ben Littman, CFP

Founding Member, Corporate Development
at Pure Financial Advisors, LLC

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](#)