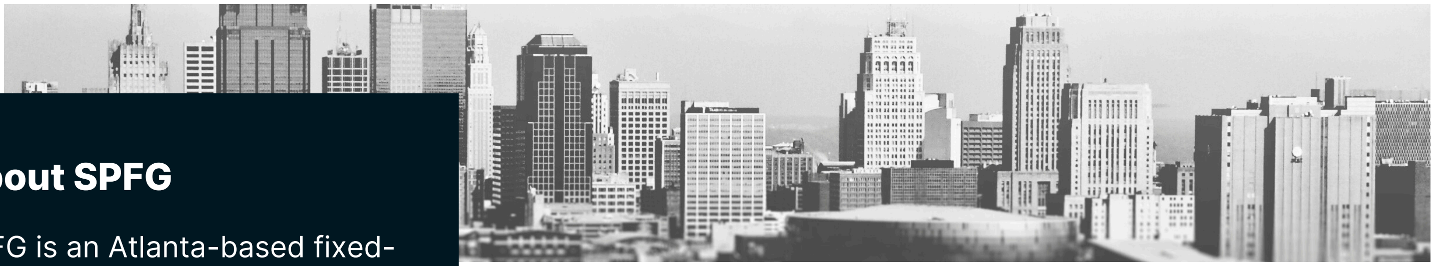
CASE STUDY | 2025

How SP Financial Group Harnesses FINTRX to Expand Advisor Reach & Drive Fixed-Income Growth



About SPFG

SPFG is an Atlanta-based fixed-income firm dedicated to helping RIAs deliver customized bond portfolio solutions to their clients. The firm provides a suite of individual bond portfolio services, designed to meet each client's income, duration, and liquidity objectives. SPFG's expertise spans portfolio management, trading, research, and support.

SPFG constructs customized municipal and taxable bond portfolios, with laddered maturities and investment-grade securities. The firm also builds ESG-oriented portfolios, leveraging the expanding supply of green and social-impact bonds to align investments with client values. Beyond traditional strategies, SPFG manages total-return opportunities through closed-end funds, preferreds, relative-value trades, and structured notes.

SPFG® STRENGTHENING YOUR BONDS

Challenges

As a firm rooted in service and long-term relationships, SP Financial Group (SPFG) recognized the need for a platform that could support personalized, scalable outreach, helping its growth team connect with the right RIAs while maintaining the individualized attention their business model demands.

- **Advisor Personalization:** The SPFG team needed a way to tailor outreach and communications for specific advisors, mirroring the customization they bring to portfolio management.

- **Streamlined Targeting:** Identifying RIAs aligned with SPFG's specialized bond solutions required data precision and efficiency.

- **Scalable Relationship Building:** With a lean but experienced team, SPFG sought tools to expand its reach without compromising the white-glove experience advisors expect.

Why They Chose FINTRX

SPFG turned to FINTRX for its AI-powered efficiency, depth of data, and exceptional client support. The platform's intuitive interface and intelligent targeting capabilities made it easy to identify high-fit advisors and craft outreach that feels personal and relevant. The standout feature for SPFG was the AI-driven email function, AI Analyst, which tailors messages to each advisor based on their firm characteristics and investment behavior, and much more, saving hours of manual work while improving response rates. Combined with FINTRX's hands-on client success team, SPFG gained a powerful prospecting engine that matches the sophistication of its own client service model.

Results & Impact

Even in early implementation, SPFG's team has seen measurable gains in outreach quality, speed, and confidence. FINTRX has helped streamline prospect discovery, refine engagement, and preserve the firm's high standard of service.

- **Personalized AI Outreach:** Advisor communications are now dynamically crafted to reflect each target's needs, creating more meaningful first-touch conversations.

- **Efficient Target Identification:** AI-driven search and filtering allow SPFG to focus on advisors who align with their fixed-income philosophy and customization capabilities.

- **Consistent Support:** FINTRX's proactive client success team provides ongoing list optimization, verification, and workflow assistance, keeping data accurate and outreach seamless.

- **Replicable Growth Framework:** The firm's approach to relationship-driven growth now scales effectively, enabling SPFG to engage new RIAs while preserving its hallmark accessibility and care.

"In my opinion, FINTRX is the leader for finding advisors—whether in asset management, fintech, or whatever you're looking for. It's the very best out there, and you should look no further."

Shawn Paulk
Chief Growth Officer, SPFG

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.

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