

How Vanbridge Leverages FINTRX to Identify High-Intent Advisors & Accelerate Insurance Distribution



About Vanbridge

Vanbridge is an insurance and alternative capital solutions firm that helps advisors, business owners, and institutions address complex planning and risk challenges through an integrated approach. The firm combines expertise in life insurance, executive benefits, and insurance-based capital strategies to support succession planning, retention, and tax-efficient wealth transfer.

Working closely with financial advisors and their business-owner clients, Vanbridge delivers both straightforward protection solutions and customized strategies designed to preserve and optimize long-term enterprise and personal wealth.

Challenges

As [Vanbridge](#) continued to deepen its focus on the independent advisor channel, the opportunity wasn't access—it was precision. Identifying the right advisors, understanding how they operate, and engaging with context required a more structured approach than traditional prospecting methods allowed.

- ◆ **Limited Visibility into What Advisors Actually Do:** Public profiles and databases provided surface-level information, but lacked insight into whether advisors were working with business owners, retirement plans, or relevant client segments.
- ◆ **Manual Effort to Validate and Prioritize Prospects:** Prospecting required cross-referencing LinkedIn, referrals, and self-built workflows, making it time-intensive to confirm who was worth engaging.
- ◆ **No Clear Way to Segment by Business Relevance:** Without structured filters, isolating advisors based on specific business characteristics, such as plan focus, client type, or growth strategy, required additional manual refinement.
- ◆ **Manual Tracking of Advisor Transitions:** Identifying when advisors moved from wirehouses to independent channels, often key moments for engagement, required manual tracking rather than a centralized view.
- ◆ **Context Built During Conversations:** Understanding how an advisor actually operates, including client mix and areas of focus, often developed during conversations rather than before outreach.

Why They Chose FINTRX

FINTRX stood out as a more direct way to align prospecting with how advisors actually operate. Instead of relying on surface-level signals, Vanbridge can identify producers based on business focus, client exposure, and firm structure—refining searches in real time. With the ability to build, adjust, and export targeted lists, outreach is grounded in context before the first interaction.

Results & Impact

FINTRX now supports a more structured day-to-day workflow—surfacing market movement, organizing prospecting activity, and enabling more consistent, timely outreach.

- ◆ **Precise Identification of Relevant Advisors:** Searches can be narrowed based on factors like AUM, geography, and business focus, allowing Vanbridge to move from broad lists to highly specific targets aligned with its niche.
- ◆ **More Informed Outreach Driving Faster Engagement:** Visibility into advisor business models and shared context enables more relevant outreach from the first touchpoint, resulting in quicker responses, including same-day callbacks.
- ◆ **Real-Time Triggers for Outreach:** [Push notifications](#) around acquisitions, recapitalizations, and advisor movement surface timely opportunities, often before they appear in traditional news feeds.
- ◆ **Stronger Connection Through Shared Affinity:** Identifying common ground—such as military background—creates a more natural entry point for outreach and adds immediate credibility. As Noel Anderson, VP of Executive Benefits at Vanbridge, noted, *“That automatically gives me a lot of credentials when I make a call.”*
- ◆ **Structured Prospecting and Call Planning:** By building and organizing targeted lists upfront, FINTRX supports a more disciplined approach to prospecting, helping ensure time is spent on outreach rather than figuring out who to call.
- ◆ **Improved Visibility Across Relationships and Teams:** Shared access to [relationship mapping](#) helps surface opportunities across different areas of the business without requiring additional tools or workflows.

“Without any further guidance, a financial advisor is just a financial advisor. We don't know what the mix of business is. With the right filtered search, customized to me, I've been able to get responses back... literally same day. It's kind of cool to have a really nice picture before you even make the phone call.”

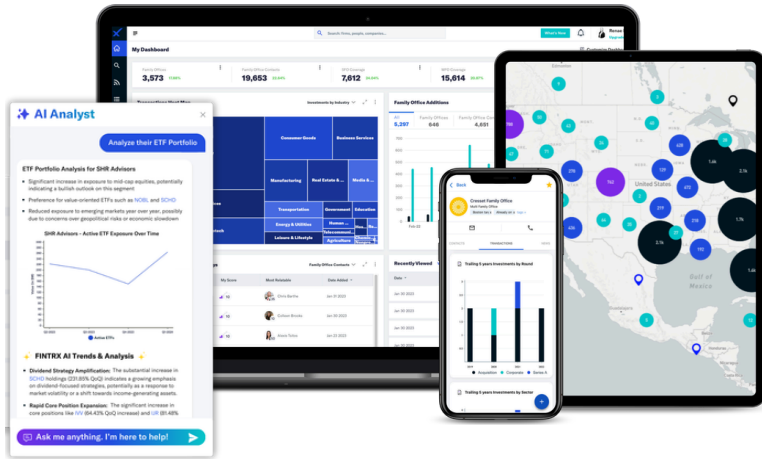


Noel Anderson

VP Executive Benefits at
Vanbridge, an EPIC company

About FINTRX

AI-Driven Private Wealth Intelligence That You Can Trust



[FINTRX](#) is the leading private wealth intelligence platform, offering the industry's most expansive and up-to-date data on registered investment advisors, broker-dealers, wealth teams, family offices, endowments, and foundations.

Powered by [industry-leading AI](#), FINTRX helps firms distribute funds, raise capital, recruit advisors, identify M&A targets, and drive strategic growth.

FINTRX now provides access to data and intelligence covering 850,000+ financial firm and contact records, including more than 4,400 family offices and 44,000 RIA and broker-dealer firms.

To learn more or request a trial, scan the QR code below.



[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.

[Advisor Recruiting and 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.

[Asset Raising](#)

Target the right investors, personalize outreach & accelerate capital-raising with data on 4,400+ family offices, including investment preferences, direct investment activity, and key investment decision-makers.

[Lead Generation](#)

Instantly surface RIAs, broker-dealers, and family offices that align with your product or service, eliminating wasted outreach.