



**January 2024**

# **Family Office & Registered Investment Advisor Data Report**

MONTHLY PRIVATE WEALTH DATA REPORT



[www.fintrx.com](http://www.fintrx.com)

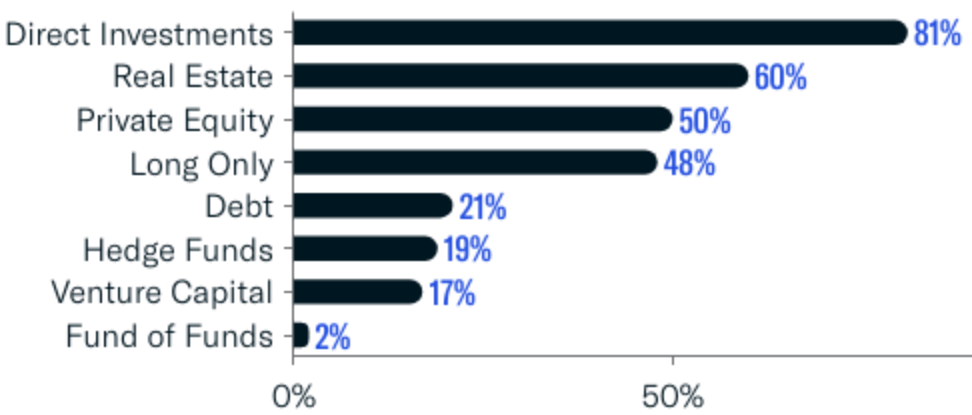
Family Office Data Report: January 2024

Data: [FINTRX Family Office Database](#)

Family Office Platform Updates & Additions

- New Family Offices: 40+
- New Family Office Contacts: 480+
- Total Family Office Additions: 1,030+
- Total Updated Family Office Entities: 5,500+
- Newly Tracked Family Office Investments: 510+
- New Family Office Data Points: 5,300+
- Total Family Office Assets Added: \$85B+

Asset Class Interest Breakdown

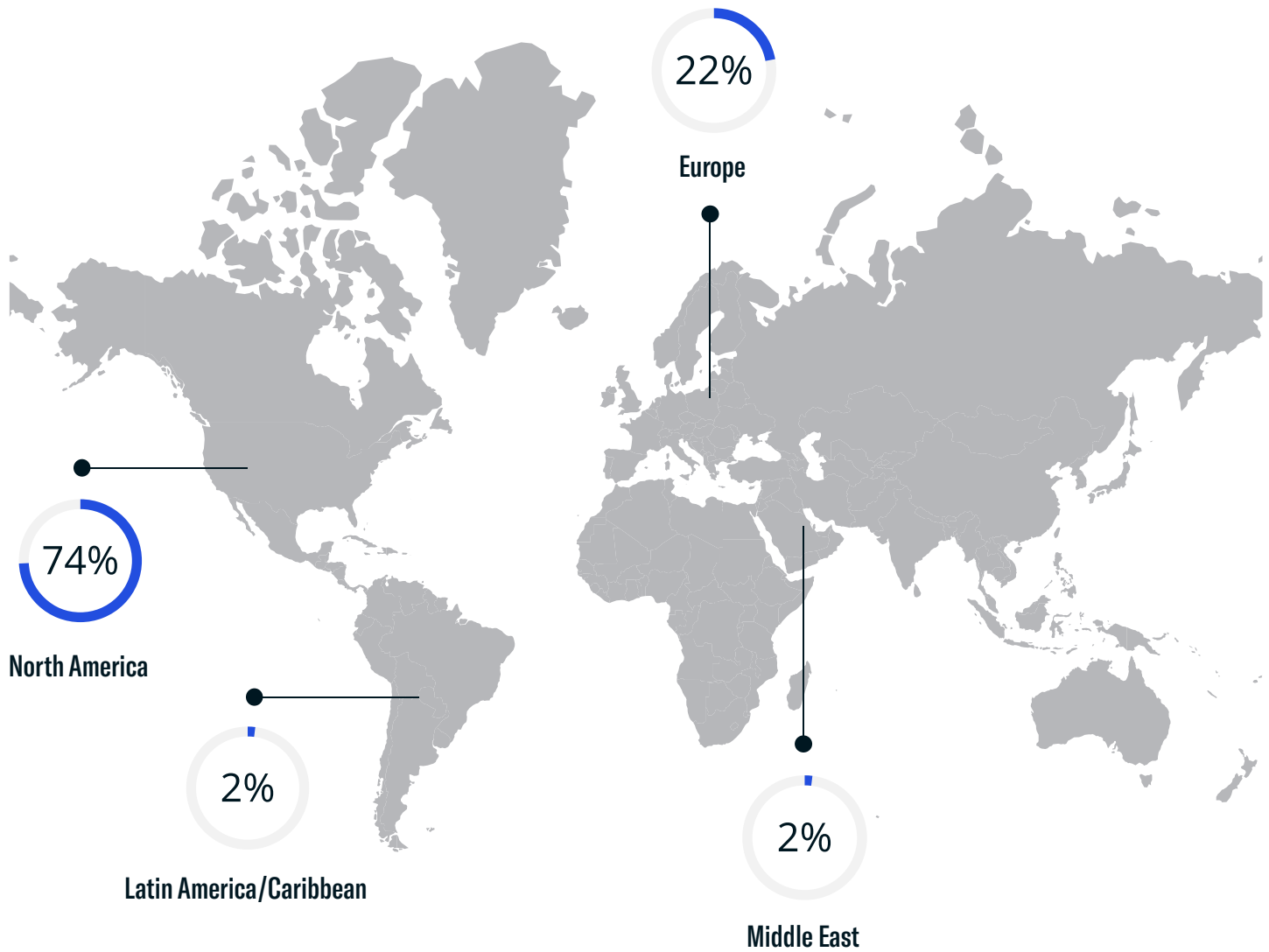


When it comes to the asset class interest of newly added family offices, FINTRX continued to see a majority of firms (81%) allocating via direct investments into private companies, followed by real estate and private equity.

Family Office Geographical Breakdown

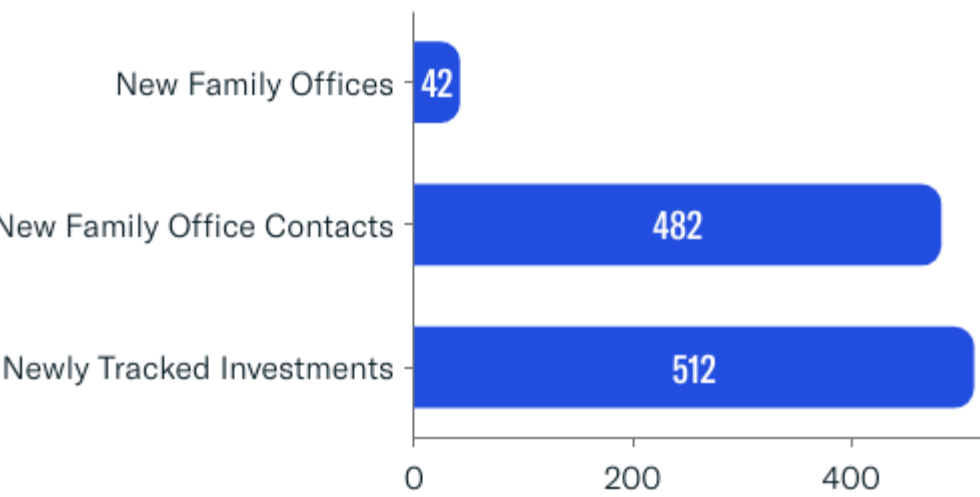
Regions with New Family Office Activity

The vast majority of family offices added to the FINTRX Family Office Dataset in January are headquartered in North America, accounting for 74% of total firms. European offices accounted for roughly 22%, with the Middle East and Latin America/Caribbean making up the remaining offices.



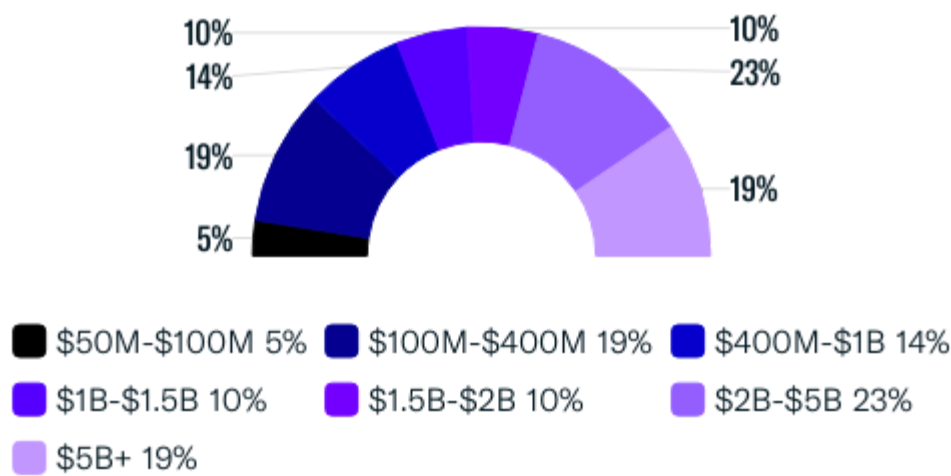
Family Office Platform Additions

Newly Added Family Offices, Family Office Contacts & Tracked Investments



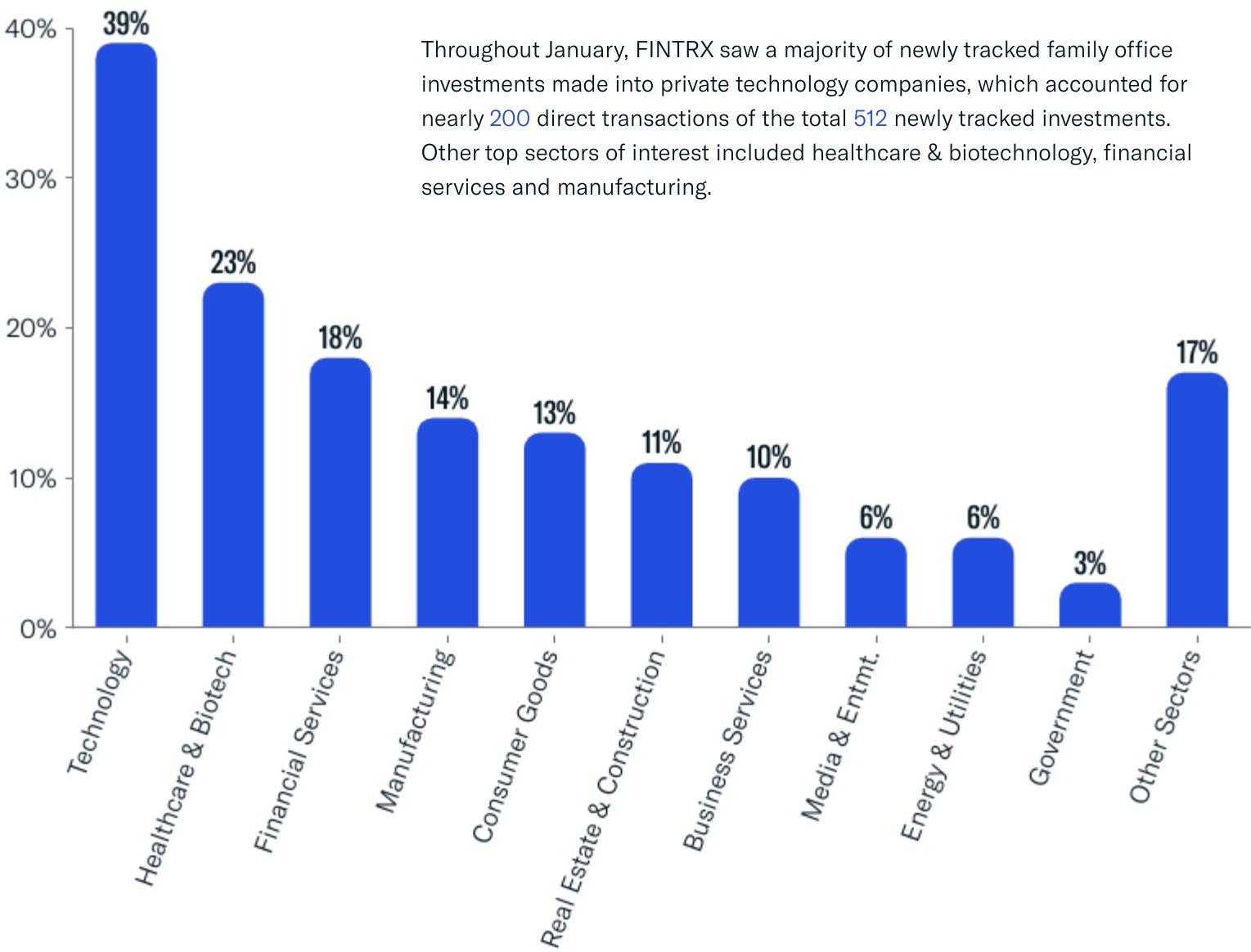
Assets Under Management (AUM)

Newly Added Family Offices that Disclosed their AUM



Newly Tracked Family Office Investments

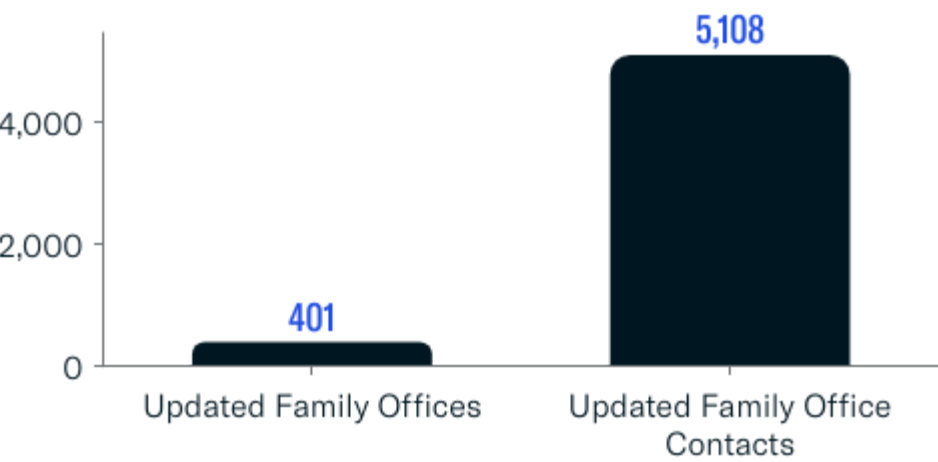
Top 10 Sectors of Interest



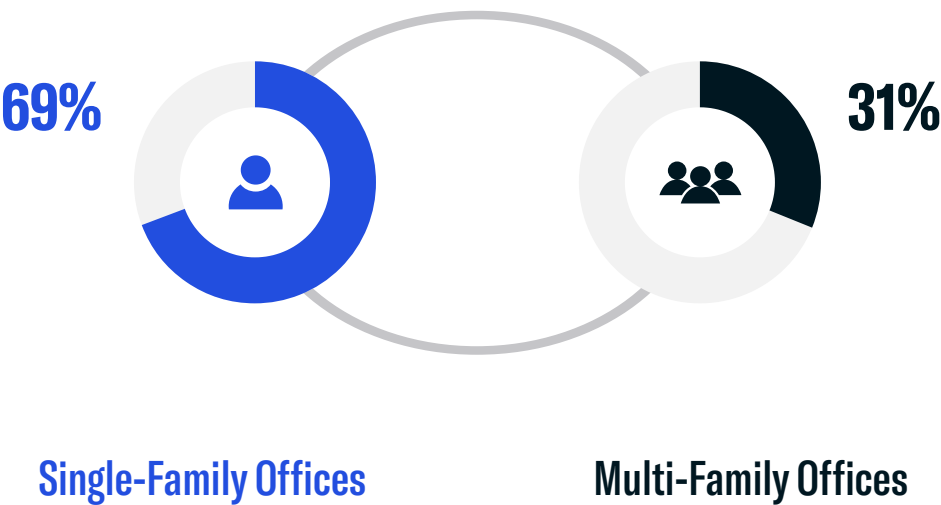
Throughout January, FINTRX saw a majority of newly tracked family office investments made into private technology companies, which accounted for nearly 200 direct transactions of the total 512 newly tracked investments. Other top sectors of interest included healthcare & biotechnology, financial services and manufacturing.

Updated Family Office Entities

Updated Family Offices & Family Office Contacts



Single-Family Offices vs Multi-Family Offices



# Registered Investment Advisor (RIA) Data Report: January 2024



Data: [FINTRX Registered Investment Advisor \(RIA\) Database](#)

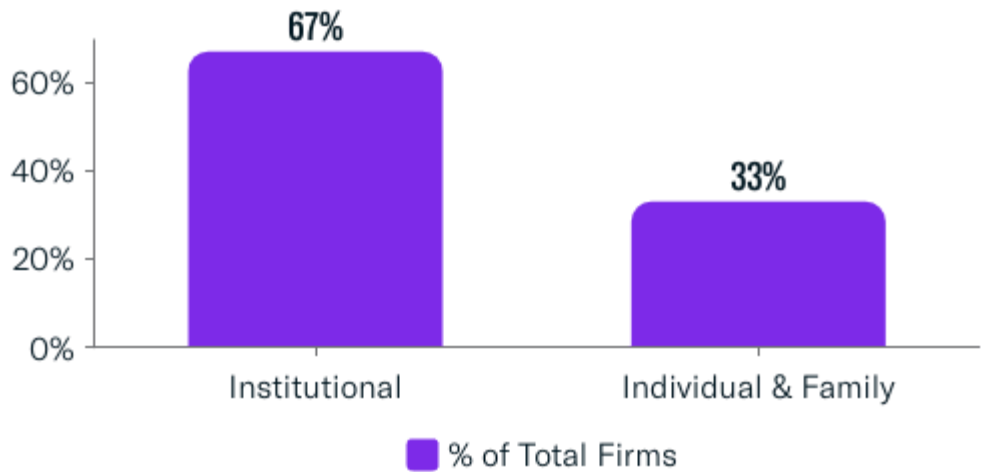
## RIA Data Highlights

### New Platform Additions for January

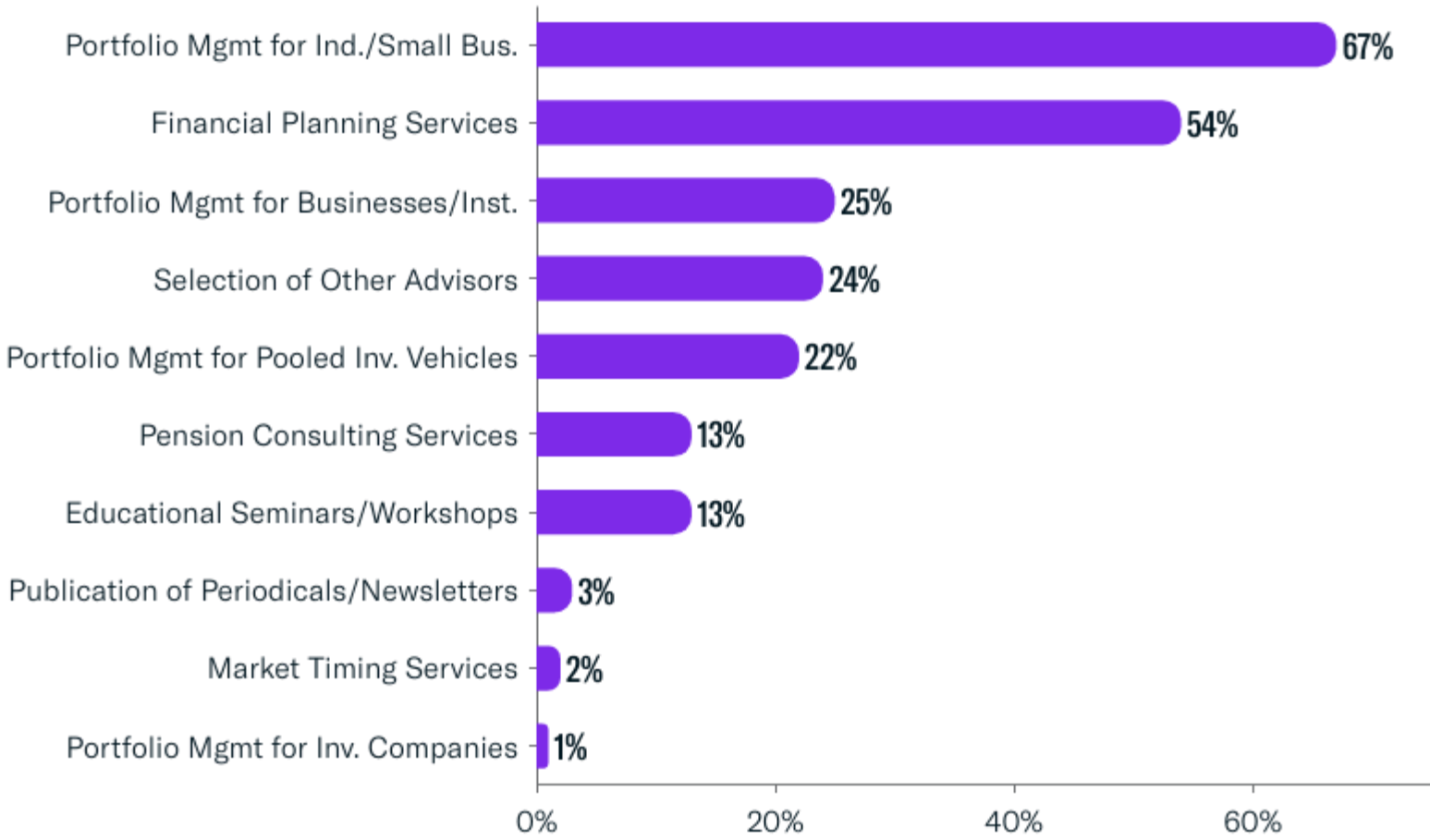
- Total Registered Entities (including Dually Registered): **90+**
- Total Registered Contacts: **3,270+**
- Total Accounts: **2,650+**
- Firms Using Alternatives: **71 or 78%**
- Total AUM Added by New RIA Firms: **\$34.4B+**

## RIA Client Base Breakdown

The newly added RIA firms added to FINTRX in January show that **67%** of their client base is institutional, while individual and family clients account for roughly **33%**.



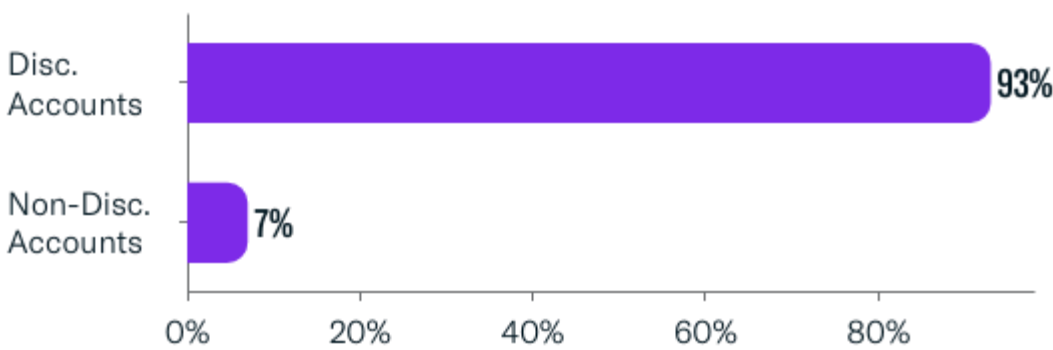
## RIA Services Provided



Of the new RIA firms incorporated into the FINTRX RIA dataset, **67%** offer portfolio management for individuals and small businesses, while **54%** provide financial planning services. It is important to note that RIA firms typically offer more than one service.

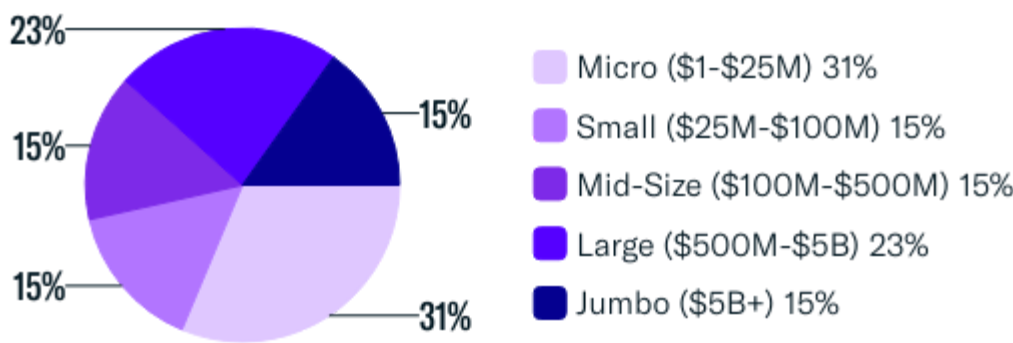
## Accounts Breakdown

### Discretionary vs Non-Discretionary Accounts Added



The [FINTRX RIA dataset](#) saw a significant addition of discretionary accounts to our dataset in January, making up **93%** of new accounts added.

## Firm Size by Assets Under Management

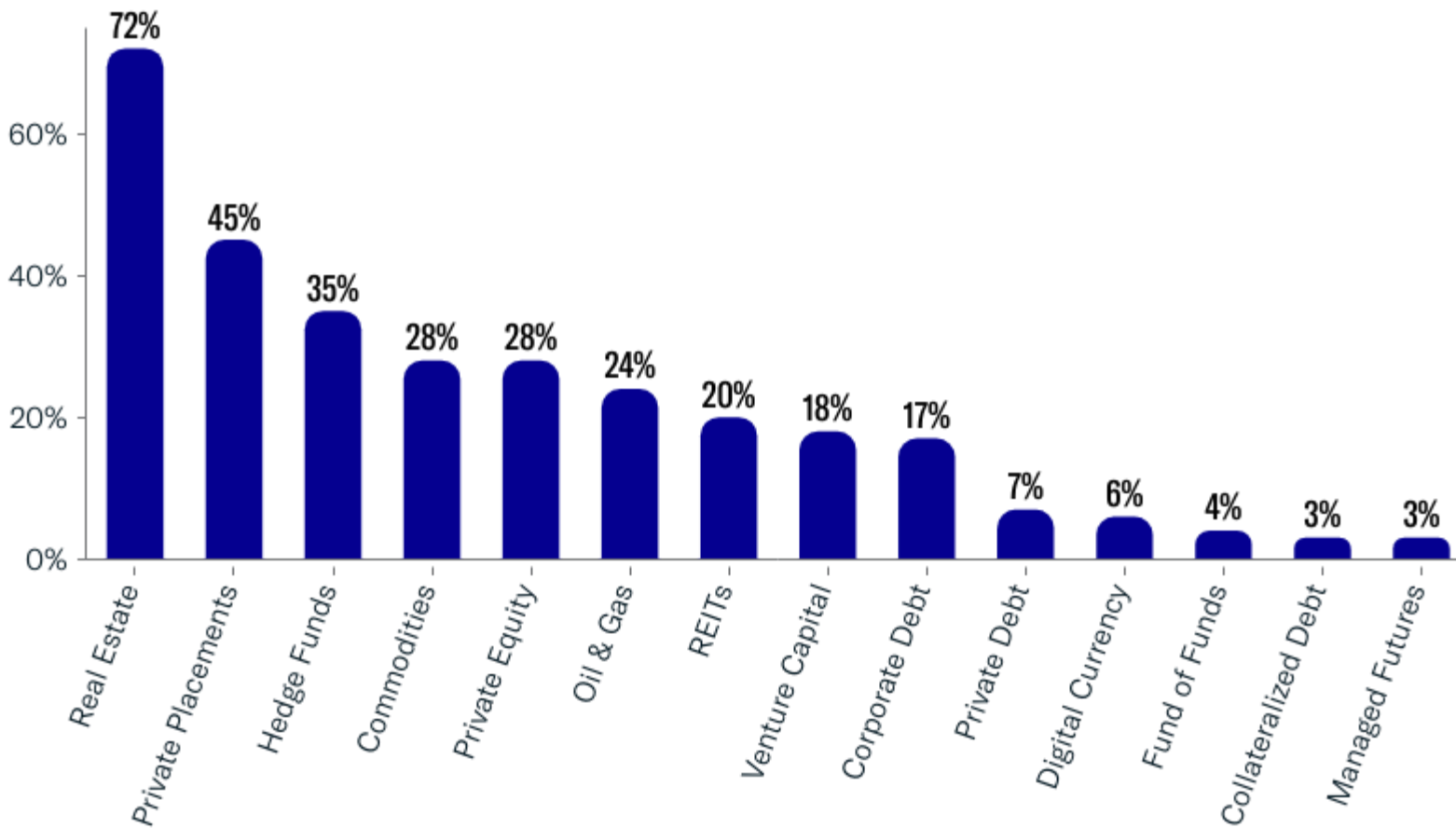


In January, a majority (**31%**) of newly added RIA firms fall under the 'micro' category, managing assets between \$1 and \$25 million.

## Alternative Investments Utilized

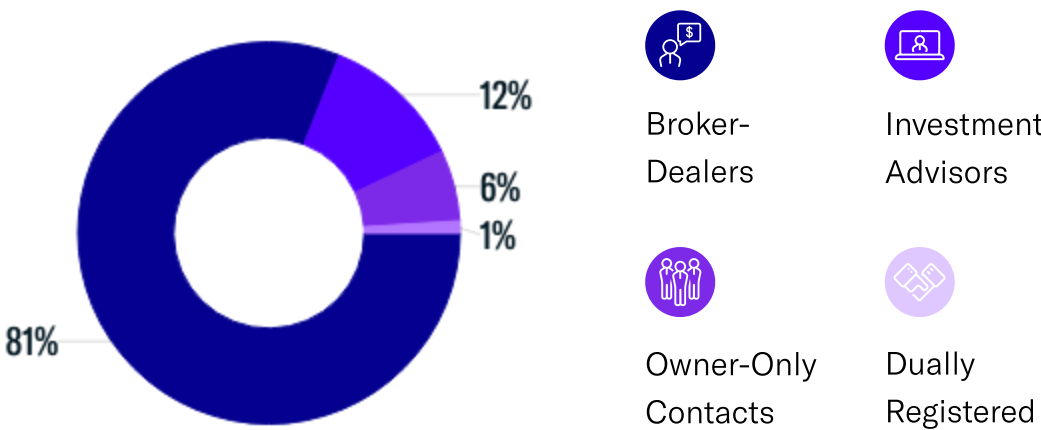
### Firm Level

**72%** of newly-added RIA firms displayed some allocation to real estate within their investment portfolios. A smaller fraction displayed interest in private placements, hedge funds, private equity and REITs, among various other alternative investments.



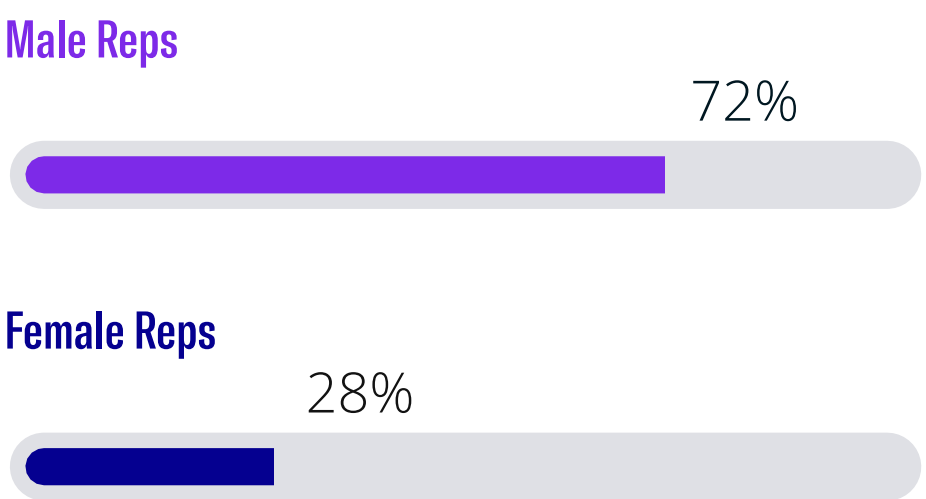
## Contact Breakdown by Rep Type

A majority (**81%**) of newly added RIA representatives are registered as broker-dealers. Smaller segments included those registered as investment advisors at **12%** while owner-only and dually registered contacts made up a combined **7%**.



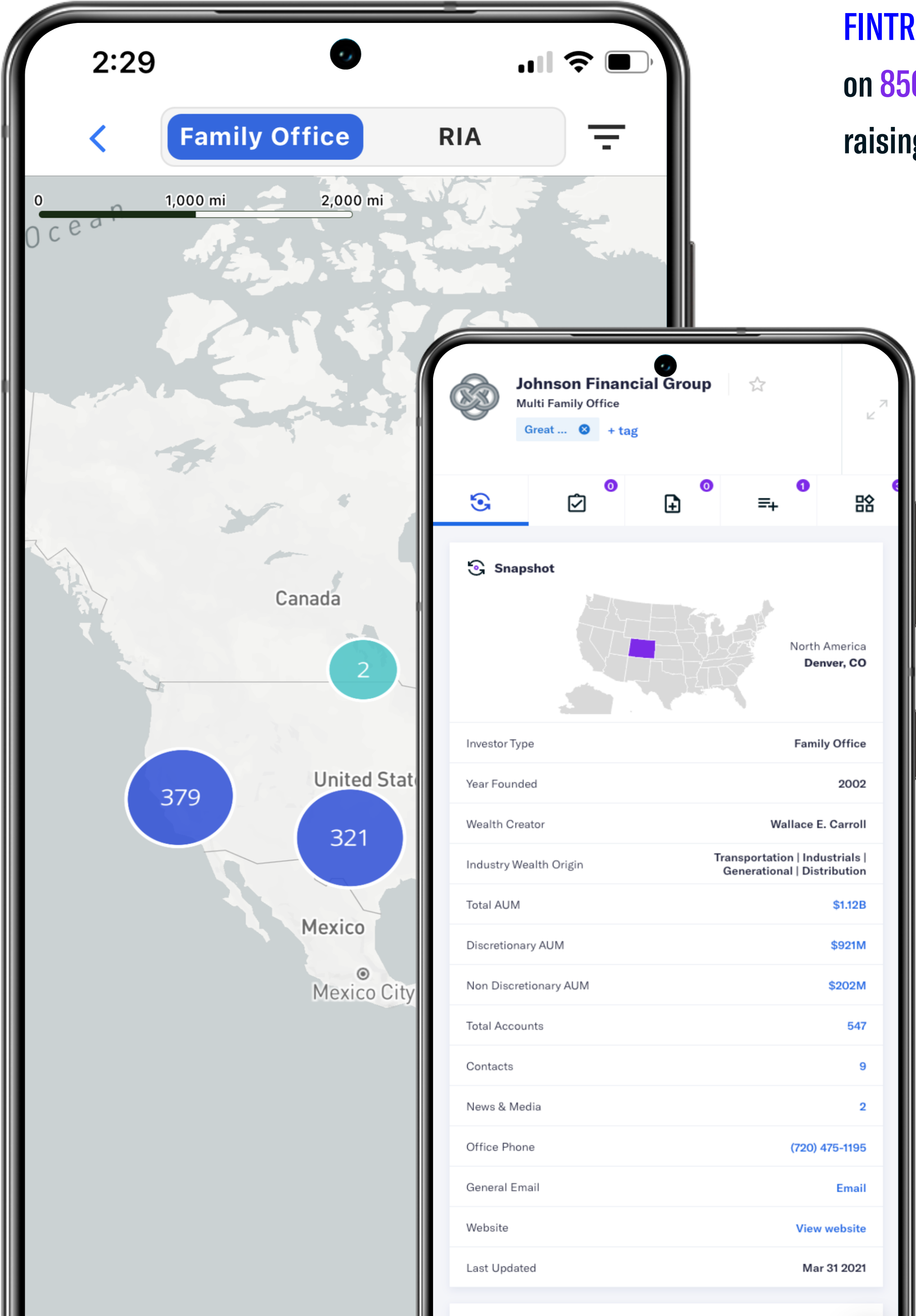
## Rep Gender Breakdown

### Male vs Female Reps





# About FINTRX



**FINTRX** is a unified data & research platform providing comprehensive data intelligence on **850,000+** family office & investment advisor records, each designed to help asset-raising professionals identify, access & map the global private wealth ecosystem.

FINTRX data intelligence covers nearly **4,000** family offices, **21,000+** family office contacts, **40,000+** registered investment advisor entities, and **750,000+** registered reps. Equipped with **375+ advanced search filters** and **numerous customization features**, FINTRX allows you to seamlessly track where family office & investment advisor capital is flowing, uncover allocation trends, break down investments by sector & size, understand future investment plans and much more.

FINTRX offers comprehensive profiles on each family office and investment advisor, enabling financial professionals to gain insights into assets under management, wealth origins, investment preferences, historical investments, favored sectors and industries, among other valuable information. Data for each record is sourced from **10+** public & private sources.

**Streamline investor discovery & boost your capital-raising efforts today!**

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