FINTRX

CUSTOMER CASE STUDY

Jefferies Group

Jefferies

Investment Banking | Capital Markets

Founded in 1962, Jefferies Group is a New York City-based investment banking and capital markets firm that provides advisory, sales & trading, research, investment banking, equities, fixed income, and asset & wealth management services to corporate clients, institutional investors and high-net-worth individuals. The group operates in various industries such as technology, healthcare, energy, consumer products, real estate and more. As an investment bank, Jefferies assists companies in raising capital through issuing stocks & bonds and facilitating M&A deals. The firm has a strong presence in the United States and has expanded its operations to include offices in Europe and Asia, among others. Jefferies is known for its expertise in middle-market M&A, as well as its capabilities in high-yield debt and leveraged finance. The firm has a long history of success and is a well-respected participant in the financial services industry.

Their Challenge

Navigating the registered investment advisory (RIA) domain is often a difficult and tedious task due to its fragmented and opaque nature. In this complex ecosystem, firms like Jefferies often find themselves encountering substantial hurdles in sourcing leads and actionable data. One of the chief challenges Jefferies grappled with was pinpointing the right RIAs that would exhibit an interest in their specialized deal flow and broad-ranging product offerings.

Jefferies' diverse product suite spans from structured products and alternative investment opportunities to municipal bonds. Identifying RIAs that match Jefferies' specific offerings is like finding a needle in the vast financial market haystack. This task is complicated further by the ever-evolving nature of RIAs, their strategies and the shifting regulatory landscape. For firms like Jefferies, staying on top of these changes is key to successfully navigating this intricate terrain.

The traditional method of manually sifting through a firm's SEC filings to garner essential details proved to be not only time-consuming but also misleading. Robert Peyreigne, the Global Head of Wealth Management at Jefferies, recognized the need for a more refined approach. He chose to partner with FINTRX, harnessing the capabilities of our advanced private wealth intelligence solution. This strategic move allowed Jefferies to optimize their RIA prospecting strategies, accurately pinpointing and connecting with their target firms with enhanced precision.

The Results

Peyreigne, alongside the Jefferies team, has found significant success in incorporating FINTRX as a cornerstone of their business strategy. It has proven particularly beneficial in pinpointing registered investment advisors that align with their business aspirations, investment aims and preferences.

Leveraging the extensive data on RIAs and their representatives, Jefferies has managed to refine their targeting strategies. This has enabled them to provide more customized and pertinent services to their clientele, consequently driving more business opportunities

Analyzing factors such as investment history, individual advisor AUM, underlying clientele, and industry focus, Jefferies has been able to quickly build a comprehensive list of RIAs that align with their offerings. The ability to set alerts and notifications has kept them up-to-date with changes in their target market and ongoing relationships, creating a dynamic and responsive strategy.

Jefferies is a highly active and valued client of FINTRX, meeting weekly to strategize business plans for future growth, and relying on key FINTRX-native data points across the industry. The integration of FINTRX into Jefferies' business strategy has led to significant successes such as providing efficient coverage across multiple business units. By leveraging FINTRX, Jefferies continues to drive high-level business growth and enhance its outreach efforts.

"Available, proactive and very helpful. FINTRX is an organization that knows how to deliver results."

Robert Peyreigne

Global Head of Wealth Management

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 is a vertically integrated software and data platform that enables wealth professionals, financial institutions and asset management firms to seamlessly map, access and sell into the global family office, broker dealer and registered investment advisor ecosystems. Thousands of users at leading firms trust FINTRX to leverage the power of intelligent data, target the correct firms for capital raising, build stronger relationships, and make better data-informed decisions.

FINTRX's intuitive search engine, proactive alerts, network-expanding capabilities, and warm introduction paths help customers efficiently uncover new opportunities to grow their business and drive successful outcomes.

Access to FINTRX data is delivered via its award-winning cloud-based platform, fully integrated iOS mobile applications, and its many CRM and API connectors, including Salesforce, Navatar, Hubspot, Snowflake, and others. Using automation, artificial intelligence and our expansive research team, we put real-time data in your hands to ensure successful outcomes.

Request a demo below for more information on how FINTRX can simplify your capital raising processes.

Schedule Demo

FINTRX Platform Features

Raise Capital

Using automation, artificial intelligence and our expansive research team, we put real-time data in your hands to ensure successful outcomes.

Unlock Your Network

Uncover your shared commonalities to drive better rapport with 850,000+ decision-makers.

Enrich Your Data

Uncover hidden networking opportunities within your data to drive better prospecting and deliver successful outcomes.

iOS iPhone & iPad Mobile Application

Access FINTRX family office & RIA data directly from your iPhone and iPad. Increase efficiency, identify prospects & bring FINTRX with you on the go.

Market Intelligence

Filter through areas of investment interest, AUM, asset flows, intent signals, potential associates and more...