3 Common Challenges We Solve For Our Clients Targeting Family Offices

Like many companies, **FINTRX** evolved from a personal pain point - the inability to find updated, quality information on the private wealth and family office markets. Today, **FINTRX** is the result of years of client feedback, each looking for a better alternative to raising capital. As we continue our mission to keep users locked in to the most actionable set of family office data available to the industry, our *Client Success* team works closely with each user to ensure they are reaping as much value from the product as possible.

Challenge #1: Information on family offices is often outdated, making individual research efforts fruitless and time consuming.

Almost any asset raising professional will tell you, when it comes to conducting research on the family office landscape, the process is lengthy, frustrating, and all around difficult. Over time, family offices have gained the reputation of being mysterious and guarded, not willing to disclose information about their past investments, origin of wealth, and allocation preferences. This lack of exposure hinders the ability of asset-raisers to target family offices that are best suited for their investment needs. That is where **FINTRX** comes in.

The *Client Success* team at **FINTRX** works to ensure every user has a customized account that brings value and ease to their individual work flows. Users are assigned a dedicated *Client Success* contact to walk them through the search filters and provide them with the tools to narrow down search results that best match their individual needs. This saves clients hours of laborious work sifting through unorganized and obsolete information.

From there, we work with clients to produce auto-updated lists that are specific to their family office investor preferences. None of our data is static, and seeing as the family office space is constantly growing, we make sure to take as much of our client's leg-work out as possible.

Rather than spending time re-running searches to see if there have been any new updates, our users spend that time focusing on their prospecting efforts with their targeted investor contacts.

Challenge #2: Many professionals within the alternative investment industry find themselves having to juggle various products that only serve one aspect of their prospecting pipeline.

Today's prospecting environment is cluttered with various products that only assist with specific aspects of professional workflows. People find themselves using one system for documenting research, another for their CRM functions, and another to share information with team members. Having to switch between various products is tedious and inefficient, which is why the **FINTRX** platform is designed to streamline user's productivity. Specifically, the *Customer Success* team endeavors to centralize all of our client's processes to ensure that their asset-raising efforts are impactful and valuable.

When on-boarding our clients, we demonstrate how to interact with the data in order to share with team members, plan travel through our Search Vision feature, and how to utilize our *"Industry News"* module to stay current on relevant updates in the alternative investment industry. Additionally, within the **FINTRX** platform, we have built a full-service CRM space. This CRM module allows users to log any interactions with investors and contacts, plan events and establish reminders, as well as track any communication the user has with prospective investors. We help clients take advantage of all aspects of our platform in order to consolidate their work flow and save them both time and money.

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Challenge #3: Due to the obscure nature of the family office ecosystem, many professionals are unsure how to best approach these entities.

The **FINTRX** *Client Success* team takes clients beyond the basic understanding of our platform to help users navigate this opaque world. Our vast experience of working with professionals across every facet of the alternative investment realm, has in turn allowed us to relay the best practices that we then supply to our clients. For example, we work with users to find and leverage commonalities they have with family office contacts. Much like networking, when people have shared commonalities, they are more likely to have warmer conversations, schedule another meeting, and build a valuable rapport. Utilizing past education and employment histories, as well as Linkedin connections, can mean the difference between receiving an investment or not.

Raising capital from family offices can be hard to navigate, made more difficult by their hidden and aloof tendencies. The **FINTRX** platform and the *Client Success* team produced a system to overcome these challenges and help users increase efficiency, save time and ultimately increase capital. With many more best practices to share with our clients, the **FINTRX** *Client Success* team is a valuable resource for wealth professionals looking to improve their prospecting efforts.

ABOUT FINTRX

FINTRX is the leader in providing comprehensive family office intelligence - engineered to help you **identify, access & raise** family office capital.

Discover the power of the FINTRX platform - schedule a demo with us today!

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