

GUIDE

How to Utilize Industry Intelligence for Outreach Excellence

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Modernize your outreach efforts for optimal engagement in the family office market.





TABLE OF CONTENTS

INTRODUCTION **3**

FAMILY OFFICES: **4**

Why Capital Raisers Should be
Targeting Them

INTELLIGENCE & RESEARCH: **6**

How to Leverage Data to Direct your
Outreach Approach

SMART PATHWAYS TO MEANINGFUL CONNECTIONS: **7**

Tactics to Win in your Prospecting Efforts
Best Practices for Crafting an Effective Pitch
to Family Office Investors

FINTRX SOLUTIONS: **9**

Making Connections with FINTRX Affinity
Three Ways FINTRX Enables Success

CONCLUSION **11**

About FINTRX



INTRODUCTION

Equipping your team with the right resources and tools is critical to captivating your target prospects and ultimately providing that humanized experience.

Technology tools, like FINTRX, streamline prospecting efforts while emboldening your team with the essential information they need to contextually engage prospects.

As family offices continue to gain popularity in the alternative investment space, FINTRX offers an inside look at this cloudy landscape and provides the tools necessary for a smooth, productive and humanized outreach solution. The days of spending hours on tedious manual research are behind us, and thanks to cutting-edge technology emerging in the market, like FINTRX, asset raising professionals around the world have access to an array of tools specifically designed to **identify**, **access** and **raise** family office capital.

Discover a glimpse into what's now possible to enable success in mobilizing family office capital:



Organize prospects by creating lists and '[custom fields](#)', allowing you to track and organize virtually anything within the platform.



Seamlessly track all interactions with prospects by leveraging our tailor-made collection of capital-raising tools.



Extensive, continuously updated family office profiles with smooth CRM integrations for making further connections.



Timeless, street-level view search capabilities (with **40+** filters) makes it easy to target specific family office investors.

In this guide, we will explore outreach best practices and insights you can leverage today - derived through the analysis of our own data plus years of extensive research into the family office ecosystem.

FAMILY OFFICES

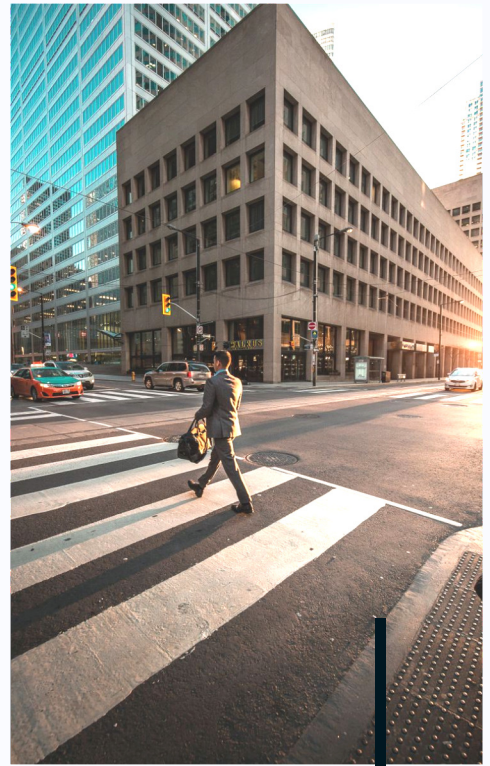
Why Capital Raisers Should be Targeting Them

In the past few decades, family offices have become distinguished financial models for the ultra-wealthy, not only acting as financial mentors to their clients, but also providing opportunities for wealthy families, entrepreneurs and startups to attract and mobilize family office capital. Oftentimes, these private groups seek opportunities to invest in new, upcoming markets that can offer substantial returns.

From a fund-raising perspective, family offices are increasingly being viewed as ideal investors: offering efficiency and streamlined decision-making, large individual check sizes, and often a high degree of flexibility compared to typical investors.

While these groups tend to be smaller and a bit more reserved out of respect for their clients, it is important to recognize the many advantages they have to offer.

The evolution in the maturity of family offices has become attractive to capital raisers. See the main reasons as to why the unique structure of family offices makes them optimal investors.



1

Family offices are comprised of qualified professionals with extensive experience in a whole set of wealth management services.

2

Family offices utilize a massive spread of investment opportunities and often take a long-term approach to capital allocation.

3

Family offices offer a total outsourced solution to managing the fortunes of high net-worth families. Each have unique structures that are specifically suited to fit the values and needs of their clientele.

4

Aside from having greater freedom and flexibility when it comes to allocating capital, family offices open doors to a variety of co-investment opportunities with alternative types of capital.

5

Family offices often take a more direct approach to investing. By increasing exposure to higher-yielding assets, all industries continue to attract family office capital given their ability to diversify.

6

Family offices with sticky capital and a high-level of sophistication tend to be riskier in their investment approaches, oftentimes investing in emerging markets, such as biotechnology or cannabis.

Navigating the Family Office Market: SFOs vs MFOs

[DOWNLOAD WHITE PAPER](#)

Family offices will continue to evolve in the coming years, but their values remain intact. To discover more about the unique nature of single family offices and multi-family offices, take a look at our newest white paper available below.

The paper outlines the subtleties between single family offices and multi-family offices, provides the answers to commonly asked questions and forecasts future trends for our space based on predictive data.

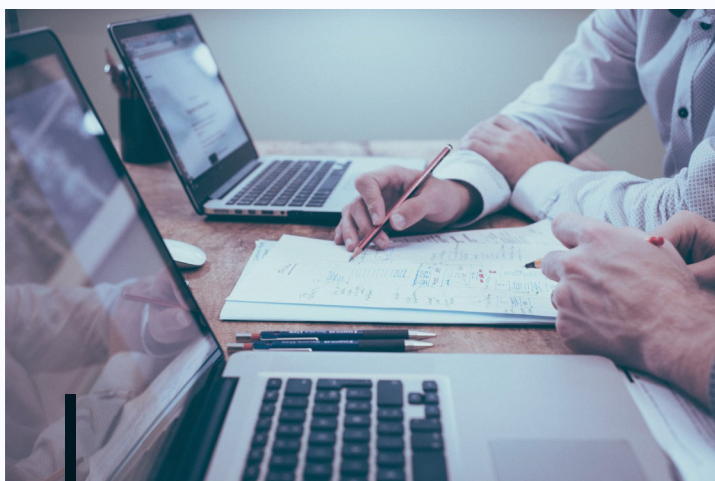
Take an in-depth exploration into the distinctions between [Single Family Offices](#) and [Multi-Family Offices](#), (plus best practices to tailor your approach!) in our latest [13-page white paper](#).

INTELLIGENCE & RESEARCH

How to Leverage Data to Direct your Outreach Approach

Before all else, you must have a sound understanding of the intricacies of the space, as well as a clear idea of your needs, goals and purpose(s) for seeking a family office in the first place. This information proves to be advantageous because it helps to then align your interests and values to that of the offices themselves.

Embracing digital innovation and integrating data tools are two vital components to growing a successful business. However, today's tech-driven society has led us to be inundated with information, making it harder to find relevant information that you can trust and properly utilize. Straying away from old-fashioned prospecting approaches, FINTRX offers a variety of asset raising tools in a one-stop-shop solution, each designed to streamline your access to the global family office landscape.



Tailor each dossier specifically for your firm by pulling and highlighting the most relevant information. All highlights can be viewed across your entire team or kept personal within your account.

Better yet...create a string of comments and notes on each highlight to easily collaborate across your team members to ensure no prospect falls through the cracks.

In the midst of an ever-changing market characterized by volatile human behaviors and rapid technological advancements, FINTRX delivers a one-stop solution to help ensure you have the data you need, as well as the tools to leverage it. This enhances productivity and creates significant value.

SMART PATHWAYS TO MEANINGFUL CONNECTIONS

Tactics to Win in your Prospecting Efforts

The family office ecosystem is inherently obscure. This makes finding, approaching and maintaining sound relationships with those in the private wealth space a challenge. Given their distinct standards and preferences, those targeting this wealth channel must think outside-the-box to ensure effective engagement. It's imperative to craft the right messages, make warm introductions feel effortless, and ensure what you're bringing to their attention in the form of your pitch is executed with as much detail and insight into their preferences as possible.

To ensure genuine engagement with these remote entities, we have outlined three best practices for crafting a pitch that turns heads and gets funds.

Have proactive & diverse outreach strategies in place.

1

Leverage commonalities with those in the private wealth space for a humanized & diversified outreach approach.

Continuously work to build your network.

2

Use your professional network as a foundation for further exploration & expansion into the private wealth space.

Actively manage & boost your reputation.

3

Cultivate strong ties with family offices worldwide through diligent, persistent and personable outreach techniques

SMART PATHWAYS TO MEANINGFUL CONNECTIONS

Best Practices for Crafting an Effective Pitch to Family Office Investors

1 Understand the family office space

To successfully engage family office investors, it is fundamental to have a solid understanding of the intricacies of the space. Start by analyzing their portfolios to determine if you have any aligned interests. *What can you offer them? How would your venture add value or help diversify their portfolio?* Another streamlined method includes researching those who have successfully raised from a family office before. Not only will this provide a clearer understanding, doing so may also provide you with unforeseen opportunities to expand your family office network.

2 Leverage any and all commonalities with investors

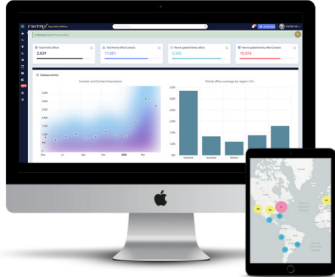
Today's breakthrough technologies makes finding commonalities with those in your family office network easier than ever before. Because each office is distinct from one another, it makes finding and leveraging commonalities all the more valuable. Powerful family office data and research platforms such as FINTRX allow you to discover unique similarities with investors that drive strong connections. Common elements such as shared alumni roots, previous employment history, overlapping years at previous stops, board and charities you share and even passions shared outside of the office. You can do this manually within your own network, or leverage technology & evolving algorithms with an offering like our [FINTRX Affinity](#) solution.

3 Have a persistent, yet polite follow-up method in place

As a leading family office database, we find the most productive methods for ensuring effective engagement is to be proactive, persistent and diverse. Just as each family has its own system in place, family offices follow suit, providing distinct services that fit the needs of the individual(s) and/or families they serve. Because each office is different from one another, it makes finding and leveraging commonalities all the more valuable. FINTRX offers up warm introductions and seamless CRM integrations for making further connections - on LinkedIn, for instance, which you can do directly from the platform. This helps ensure major outreach opportunities are never missed.

FINTRX SOLUTIONS

FINTRX is built for the asset raising professional who seeks high level investor data, prospect tracking tools and an organized approach to fundraising.

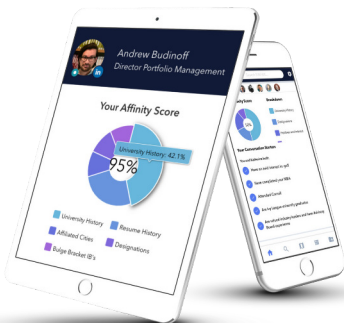


The FINTRX platform is a user-oriented research solution designed to offer seamless integration and data tools for the purpose of successfully identifying, reaching and raising family office capital. In an effort to provide our clients with a product that delivers tangible results, FINTRX works round-the-clock to expand, update and improve the many features offered. Straying away from old-fashioned prospecting methods, FINTRX offers a modern approach to streamline your access to the global family office ecosystem.

Making Connections with FINTRX Affinity

The FINTRX Affinity feature ensures your outreach is highly productive and personalized for a human-based approach.

Designed to humanize your outreach with family office investors, FINTRX Affinity works to leverage any and all commonalities you have with the **11,000+** family office contacts within the platform.



FINTRX Affinity provides users with useful information that goes beyond a contacts' professional background to also include their personal background, hobbies and outside interests. This makes all the difference when conducting outreach to potential investors, as it allows you to leverage custom conversation starters and insights provided.

→ Custom Conversation Starters

Leverage custom conversation starters tailored for your personal outreach to drive impactful conversations.

→ Find Your Best Path In

View a clear picture of your best path in and shared commonalities with your family office prospects.

→ Team-Based Insight

Immediate insight into which of your colleagues shares the most meaningful points of connection.

FINTRX SOLUTIONS

Three Ways FINTRX Enables Success

The FINTRX family office data and research platform provides a modern solution to the historically universal challenges associated with prospecting. FINTRX offers unique opportunities to make personal connections with nearly **3,000** global family offices and over **11,000+** contacts that work within them. Equipped with savvy asset-raising tools, powerful AI technology and on-the-go access, FINTRX delivers a seamless outreach experience.

1

Customizable, team-based platform

The FINTRX platform is team-based, meaning - we offer the opportunity to work collaboratively with peers while utilizing the platform, whether in the office or on the go. Each account is uniquely structured to fit the needs of the user - allowing them to specify what (prospect lists, notes, interactions, etc.) and with whom they would like to share with. Through our [custom setup options](#), FINTRX makes it easy to tailor your data needs.

2

Powerful, global search capabilities

Easily visualize the largest family office database by leveraging our proprietary '[Search Vision](#)' technology. With more than 40+ search filters, FINTRX 'Search Vision' allows users to narrow down areas of investment interest from a macro to a micro level view. The interactive map provides helpful details of investors - including their locations at a street level. Many users find this feature helpful when planning roadshows or traveling to meet investors within a particular location.

3

Personalized 'Alert Builder'

The [FINTRX Alert Builder](#) provides users with the ability to granularly customize the frequency, content & management of the notifications driven from their FINTRX profile & preferences. As the FINTRX family office dataset continues to grow exponentially, it's incredibly efficient to pinpoint and consolidate relevant updates to each individual user. Users can handpick the alert types they'd like to subscribe to. Alerts include New Additions, Favorites, Dynamic Lists, Affinity matches and more.

CONCLUSION

The inability to identify quality information on the private wealth landscape continues to pose a major challenge for those looking to raise funds. To facilitate this essential operational need, FINTRX offers a centralized prospecting tool designed to rapidly target family offices.

In the midst of economic uncertainty, it is important to reinforce the significance of good strategy, especially when identifying and connecting with those in the private wealth landscape.

Spend your time building relationships and making deals, rather than wasting hours researching potential investors.



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!

REQUEST DEMO

