

## Lanier Ivy

### *Private Equity*

Lanier Ivy is an Atlanta, GA-based private equity asset manager focused on diversified middle market private equity and debt co-investments.

Lanier Ivy offers its investors exclusive access to a unique portfolio of diversified minority equity and debt co-investments executed alongside some of the top control private equity and credit managers in the country.

## THE CHALLENGES

For those looking to raise capital, the family office landscape can be opaque and challenging to uncover. Once you have identified a family office that matches your unique offering - it is a tedious task to conduct research and source specific contact information. It is from this pain-point that Lanier Ivy sought out the FINTRX family office data and research platform.

Through the adoption of FINTRX in their daily workflow, Lanier Ivy has substantially reduced the amount of time spent researching and sifting through outdated resources. In turn, this allows the team to focus on its core competencies - building and nurturing relationships with LPs.



***"We use the database daily to efficiently manage outreach and grow our network. We could not accomplish our goals without FINTRX."***

**Robert Becker,**  
**Lanier Ivy**

## FEEDBACK

Overwhelmed with the research required to identify contacts at family offices, Lanier Ivy turned to FINTRX as a solution. In a highly competitive industry, where establishing contact in a timely manner with the right person is essential, Lanier Ivy needed access to a reliable source of information for streamlining their market research process. Not only would the FINTRX platform solve their struggle to identify suitable family offices, but they also found the platform *"offered CRM functionality that is thorough and easy to utilize."* In turn, the team is able to effectively manage their outreach and develop relationships within the one platform.

Today, Lanier Ivy is successfully utilizing our vast dataset of 3,000+ investors and 11,500+ family office professionals to *"create curated prospecting lists and focus outreach accordingly."* With an array of sorting filters available within the platform, Robert and the Lanier Ivy team are able to target investors according to their allocation preferences, location, previous investment activity and more. Reducing the amount of time spent researching family offices through our comprehensive investor profiles, FINTRX has allowed them to focus on building out their family office network with efficiency .