

Uncovering Commonalities to Drive Better Family Office Outreach

Today's technological advances make finding commonalities in your family office network easier than ever before. Comprehensive family office data and research platforms such as **FINTRX** make it possible to discover unique similarities that in turn, drive stronger, more efficient outreach processes. Sure, building relationships with these hidden entities often take time, nuance, some sort of mutual acquaintance and a variety of other techniques to ensure effective engagement. However, it may be easier than you think.

With an enormous amount of investable capital, family offices are looking for distinct ways to diversify their investment portfolios. This is great news to those looking to raise capital as it provides more opportunities to find, approach or work alongside these private groups. Before all else, you must have a sound understanding of the intricacies of the space and a clear idea of your needs, goals and reasons for seeking or building one in the first place. This information proves to be advantageous because it helps to align your interests and values to the offices themselves.

You can do this manually within your own network, or leverage technology and evolving algorithms with an offering like the **FINTRX Affinity** solution. Our data shows these commonalities and shared interests to be incredibly impactful ways to spark meaningful conversations. Find and explore commonalities you share with the key decision-makers of nearly **3,000** family offices around the world. Discover similarities such as shared alumni roots, previous employment history, overlapping years at previous stops, boards/charities they may sit on, and even passions shared outside the office - e.g. golf, wine, art, etc.

Using our savvy algorithms, **FINTRX** auto-updates your *Affinity Score* every night at midnight, thereby generating the most optimal matches for your outreach purposes every day.



Have proactive, persistent & diverse outreach strategies in place.

From past experience, we found 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 - delivering distinct services to match the specific needs of the family or families they serve. Because each office is distinct from one another, it makes finding and leveraging commonalities all the more valuable when engaging with them. Fortunately, we now live in an era with unlimited resources and innovative solutions that make finding commonalities significantly easier. **FINTRX**, for instance, provides warm introductions and seamless CRM integrations for making further connections directly from our product. This helps ensure valuable opportunities are never missed.

Continuously work to build your network.

If you are looking to connect with family offices, the best place to begin is in your own backyard - as these groups will generally be the easiest to reach. Use this as a base foundation to continue strengthening your outreach efforts. And remember, just because these groups are notoriously inconspicuous, it doesn't mean they are inaccessible. It just comes down to your outreach strategies and ability to continuously evolve with the industry.

Actively manage & boost your reputation.

Know what it is you stand for, and don't stop working to make it happen. The more engaged you are within the family office realm, the more appealing you will be to these private wealth managers. Through diligent, persistent, and savvy outreach techniques, you too will be able to cultivate strong ties with family offices worldwide.

About FINTRX

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

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