

Keystone National Group

Private Credit | Real Estate

Founded in 2006, Keystone National Group is a Salt Lake City, Utah-based investment advisory firm focused on private credit and real estate investments. Since its inception, Keystone National has invested over \$4.3 billion of capital in 550+ transactions. The firm manages a number of funds, separate accounts, and co-investment vehicles on behalf of investors, which include pension plans, family offices, wealth management firms and private

individuals. Keystone's investments emphasize capital preservation, contractual cash flow and hard asset coverage. The firm's investment efforts are organized by Private Credit, Real Estate Lending and Real Estate Private Equity. Heston Neilson, Managing Director of Keystone National and his team are currently spearheading raising capital on their most recent real estate debt fund with a target of just under \$1 billion.

Their Challenge

Similar to many businesses, a firm's success and potential for future growth are highly driven by relationship building and having a strong network. The case was no different for [Keystone National Group](#), which was determined to cast a wide net of potential investor groups that would be ideal partners to work with.

The traditional method of finding potential partners involves conducting extensive research and reaching out to individual firms and representatives. This can be a time-consuming and inefficient process, especially when trying to reach a large number of potential partners. Furthermore, contact information often changes frequently, making it difficult to keep track of updated information.

In order for Keystone National Group to be successful in overcoming this obstacle, the company needed to implement a strategy that was more effective in locating and establishing connections with prospective business partners.

suitable prospects. FINTRX has since supplied Heston and his team with accurate intel on family offices and RIAs in one centralized location. With access to 375+ search filters, FINTRX filters out suitable investors and helps to pinpoint relationships with the highest potential.

Keystone National Group has since been able to reduce the number of hours spent speculating about whether a firm was the right fit for them and no longer has to dig for contact information that might not have been reliable to begin with. FINTRX has ultimately helped Heston and his team take a significant step toward achieving their real estate fund's ultimate goal.

The Outcome

Keystone National Group eventually turned to [FINTRX](#) for its centralized and comprehensive database of family offices and registered investment advisors, updated contact details on 850,000+ private wealth decision-makers and the ability to significantly cut down the time required to find and connect with

"Super helpful in scouring the massive amount of data out there on RIAs and family offices... I have been able to find various organizations that I would never have known about and contact information for people at that organization. I still have to search for certain contacts, but overall, much easier."



Heston Nielson
*Managing Director,
 Keystone National Group*



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...