

Landmark Capital Advisors



Real Estate

Landmark Capital Advisors is a Newport Beach-based real estate capital advisory firm disciplined in finance and private equity. Landmark Capital was experiencing the pain points many others in the real estate advisory space were facing: sourcing family office allocators who invest in alternatives.

When David Kidder, Landmark's Managing Director and industry veteran first approached our FINTRX team, there was one clear aim: how FINTRX could help their rapidly-growing real estate advisory firm find active family offices in the alternative space and help Landmark better manage interactions with investors.

Their Challenge

Prior to partnering with FINTRX, David Kidder and the Landmark team were using an array of solutions to attempt the sourcing of active family office investors, organizing investor information, tracking the firm's communication, and distributing updates and performance reports to their targets.

These individual tasks were quickly becoming overwhelming and creating inefficiencies within the team's asset-raising efforts and firm-wide communication. *"With our growth came new opportunities,"* said Kidder. *"It was clear that we needed a solution. It was either to build our own or leverage an asset-raising platform that allowed for greater family office investor coverage and visibility for our business. We chose the latter."*

With the help of our expansive family office data set, Landmark Capital Advisors was able to prospect into and interact with thousands of potential investors and family office professionals, giving them all the necessary tools to effectively tap into the family office ecosystem and achieve their goals.

The Outcome

Landmark Capital Advisors was able to leverage the actionable data and organizational tools of the [FINTRX](#) Family Office Data Intelligence platform to drive its lead generation and CRM nurturing efforts. Our innovative offering gave the Landmark team a virtually limitless way to market, raise capital, and streamline investor engagement across its team. In addition, FINTRX created a unified platform out of which the team could work more cohesively and efficiently.

"The FINTRX platform gave us every feature our marketing team needed out of the box.

From day one, we were able to quickly source investors, implement our data, and leverage the daily work of the FINTRX team to keep our family office investor pool growing and, most importantly, updated and accurate."



David Kidder

Managing Principal, Landmark Capital



About FINTRX

FINTRX offers comprehensive private wealth data intelligence on Family Offices and Registered Investment Advisors (RIA's). Our data ensures you have access to current and accurate information - driving more meetings and increasing efficiency for your business.

FINTRX provides comprehensive data intelligence on 850,000+ family office & investment advisor records, each designed to help you identify, access, and map the private wealth ecosystem. Explore in-depth dossiers on each family office & investment advisor. Access AUM, source of wealth, investment criteria, previous investment history, sectors & industries of interest and advisor growth signals, among other key data points.

Additionally, FINTRX provides insight and expansive contact information on 850,000+ decision-makers, featuring job titles, direct email addresses, phone numbers, common connections, alma maters, past employment history, brief bios & much more.

Industry-leading financial firms leverage our powerful algorithms and expansive research team to better access the complex and rapidly changing private wealth ecosystem.

Using automation, artificial intelligence and our expansive research team, we put real-time data in your hands to ensure successful outcomes.

For further insight on how FINTRX can streamline your capital raising efforts, request a free trial below.

Schedule Demo



Platform Features



Raise Capital

Identify family offices & Registered Investment Advisors that align with your fundraising goals



Unlock Your Network

Our algorithms uncover your hidden networking opportunities, driving greater rapport and warm conversations



Enrich Your Data

Our enrichment technology ensures you are armed with the most accurate data intelligence available



Market Intelligence

Monitor new hires, new capital formation, recent investments, investment interests, and much more