

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.

Their Challenge

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. The team was overwhelmed with the research required to identify contacts at family offices and struggled to find and connect with key decision-makers in the family office space.

The Results

The Lanier Ivy team eventually turned to the [FINTRX Private Wealth Data & Research Platform](#) as a solution to their lack of accurate and actionable family office data.

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 was able to effectively manage their outreach and develop relationships within the one platform.

Lanier Ivy successfully utilized our vast dataset of 3,700+ investors and 19,500+ 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 have been 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 far more efficiency.

"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



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...