FINTRX

CUSTOMER CASE STUDY

Parkview Financial

Real Estate | Private Debt

Founded in 2009, Parkview Financial is a Los Angeles, CA-based Real Estate firm specializing in ground-up commercial and residential private debt financing. As a direct private lender, Parkview provides short-term bridge and construction loans secured by first trust deeds to developers throughout the United States. Launched in 2015, its Private Debt Real Estate Fund has originated $4B+ in construction financing with loans ranging from $5M - $200M for property types, including multi-family, industrial, office, retail, residential & mixed-use.

Their Challenge

Since its inception in 2009, Parkview Financial had found it difficult and cumbersome to source the right investors for its private real estate funding opportunities - a challenge constantly faced by many players in the market.

Prior to becoming a FINTRX user, the team would spend hours on end trying to identify suitable family offices and registered investment advisors and track down up-to-date and actionable information on key contacts at those firms. This process was tedious and inefficient as the data was scarce, scattered, and often outdated or stale. The firm ultimately turned to FINTRX hoping to maintain credible and updated private wealth data for future prospecting opportunities.

The Outcome

With over 850,000+ family office & investment advisor firm & contacts records in FINTRX, Parkview Financial has been able to effectively streamline its family office and RIA research processes, and continues to strategize its approach to the market. With continuously updated information on family offices, wealth managers and key decision-makers in the industry, the team at Parkview can optimize its workflow and stay organized while accessing actionable data in a user-friendly platform.

By leveraging the FINTRX-native data fields on contact roles & responsibilities, the Parkview Financial is able to easily target the right investors and due diligence associates.

The FINTRX platform has allowed the team to segment 730,000+ family office and registered investment advisor contacts to form core lists of targeted individuals that would be interested in its Real Estate Private Debt Funds and enhance them with direct contact information, education & work backgrounds, and personal interests. By partnering with FINTRX, Parkview has streamlined their research and prospecting efforts, saving valuable time and boosting their deal flow.

> *"FINTRX provides us accurate family office, wealth manager, and registered investment advisor data that enables the Parkview team to get in direct contact with the Chief Investment Officers and Due Diligence Managers."*

Drew Weinstein

Vice President, Investor Relations

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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