

Performance Equity Management PERFORMANCE EQUITY MANAGEMENT

Private Equity

Founded in 2005, Performance Equity Management LLC is an \$11.5 billion independently owned investment management & private equity firm comprised of the former General Motors in-house private equity group. Based in Greenwich, Connecticut, the firm primarily invests in lower-middle-market companies throughout the healthcare, business services and industrials sectors. Performance Equity Management works with management teams to help grow their portfolio companies and add value. Their primary

focus is acquiring control of or making sizeable minority stakes in, businesses with enterprise values up to \$250 million. Performance Equity has allocated \$29 billion dynamically to private equity and venture capital along with 160 direct co-investments. Performance Equity brings rigor, professionalism and discipline to the private equity landscape and remains focused on growth equity, small and mid-markets, large buyouts, venture capital, co-investments and special situations.

Their Challenge

Before turning to FINTRX, [Performance Equity Management](#) lacked a reliable source of information pertaining to the single and multi-family office ecosystems. Taylor Horthy, Vice President of Business Development at Performance Equity Management, expressed a simple goal to the FINTRX team: *To properly identify and prequalify single and multi-family offices within the FINTRX data and research platform by leveraging key information such as assets under management (AUM) and legitimizing LP prospecting to further identify the best point of contact from each vertical.*

Sourcing and generating opportunities across the family office landscape posed immediate challenges for Horthy and the Performance Equity team, especially given the private nature of family offices and the private wealth vertical at large.

Performance Equity Management ultimately turned to the [FINTRX Private Wealth Database Solution](#) to gain access to 20,000+ global family office records.

leveraging the FINTRX financial advisor database as an *"Excellent - easy to navigate platform with reliable family office data that adds a level of clarity to an often opaque vertical."*

As a highly valued third-year client, Performance Equity Management continues to utilize FINTRX for market trends, new investor targets and [customized alerts & notifications](#) as it pertains to their core prospects and ongoing relationships. Plus, the 75+ search filters allow Horthy and her team to easily identify suitable prospects with information about their investment preferences, investment history and allocation preferences, among numerous other insights.

"FINTRX offers us reliable data that is regularly updated which allows our fundraising team to effectively manage prospecting lists and prequalify LPs ahead of outreach."

The Outcome

Today, Taylor and Performance Equity Management team leverages the FINTRX portal daily to better access credible and updated family office intel on 3,500+ family offices and 19,700+ key family office decision-makers. Horthy reflects on the past two years of



Taylor Horthy

*VP of Business Development,
Performance Equity Management*



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...