FINTRX

CUSTOMER CASE STUDY

Private Capital Development

Venture Capital | Private Equity

Private Capital Development LLC (PCD), established in 2018, is a specialized professional services firm that establishes initial connections between private capital fund managers (GPs) and institutional and family office limited partner investors (LPs). Since its inception, PCD has successfully facilitated thousands of connections between its expanding portfolio of fund manager clients and a global network of LPs, boasting over 650 active LP relationships. The firm's 78+ past and current clients include GPs from private equity, venture capital, infrastructure, and fund-of-funds sectors. These firms represent diverse investment strategies such as secondaries, growth equity, private credit, clean energy, agriculture, high-tech, and more.

Their Challenge

Prior to leveraging FINTRX, Private Capital Development (PCD) relied on their existing network of connections comprised mostly of institutional investors. As their client portfolio expanded and became more diverse, PCD found they needed to tap into other categories of investors to ensure better fit with the clients' profiles and strategies. As explained by Randy Mitchell, PCD Chief Development Officer: *"We were seeking greater access to family offices & RIAs globally and the key contacts within each unique entity."*

Although the team acquired access to several investor data platforms, Mitchell felt that the firm's needs for focused research and credible up-to-date information specifically in the private wealth area were not being met. PCD was also looking for a solution that would provide for a more dynamic user interface and enable efficient data integration.

As the firm continued to expand, Mitchell and the Private Capital Development team turned to the FINTRX Family Office and Registered Investment Advisor (RIA) Data and Research Platform to gain credible, actionable and updated intel into family offices, RIAs and the private capital markets at large.

The Outcome

Since harnessing the FINTRX private wealth dataset, Private Capital Development has directly integrated FINTRX data into their native HubSpot CRM system to activate a connection of nearly 4,000 family offices, 20,000+ family office contacts and 18,000+ independent wealth advisors worldwide.

Private Capital Development uses FINTRX data natively within their HubSpot CRM system to enable a scalable and repeatable process for connecting GPs to LPs. Through custom data mapping, the FINTRX HubSpot integration allows the team to leverage a preferred subset of private wealth data natively which has since been incorporated into their daily active segments.

Additionally, FINTRX data enrichment technology has not only ensured PCD is using the most accurate information on its target market, but Mitchell and the PCD team have also been able to harness hidden networking opportunities within their own data to deliver successful results. FINTRX continues to be a key partner for Mitchell and his team in driving business growth for Private Capital Development.

"FINTRX helps ensure we leave no stone unturned when connecting GPs to LPs."

Randy Mitchell

Chief Development Officer,
Private Capital Development

FINTRX

About FINTRX

FINTRX offers comprehensive private wealth data intelligence on Family Offices and Registered Investment Advisors (RIAs). 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 demo below.

Schedule Demo

FINTRX Platform Features

Raise Capital

Identify family offices and 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

Monitor & Analyze Advisor ETF & Equity Portfolios

Track 13F investment advisor portfolios and uncover key sales opportunities for your firm

Market Intelligence

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