



QUARTERLY

Family Office DATA REPORT

Q1 2021

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Message from our VP of Research

In an effort to accelerate the production of asset-raising professionals worldwide, the FINTRX family office data and research platform offers in-depth private wealth intel designed to solve the complex issues industry professionals face on a daily basis.

Our team members are dedicated, forward-thinking and constantly striving to enhance the scope and impact of our data. We aim to enhance our clients' outreach process through credible research and state-of-the-art technology.

Thank you for taking the time to read through our quarterly briefing and we look forward to a potential engagement with your team.

Dennis Caulfield

Vice President of Research, FINTRX





Introduction

FINTRX kicked off Q1 of 2021 by adding and updating hundreds of family office profiles and key contacts within our family office data and research platform. In an effort to shine a light on the growing private wealth space, we have constructed the Q1 2021 family office Data Report to showcase key family office statistics, notable trends and further exploration of the alternative wealth landscape. Continue reading for a closer look at how Q1 unfolded within our rapidly growing ecosystem of **3,000+** family offices, **11,300+** contacts, and **18,300+** tracked investments.

The Q1 2021 Family Office Data Report has been produced exclusively utilizing our expansive family office data and research platform. This cross-section of our complete data set provides an accurate representation of the alternative wealth space and private capital markets, as well as specific family office data trends compiled from January, February and March of 2021. Thanks to our dedicated research team - who continuously updates and expands our vast data set - we can share high-level information regarding family offices and the private wealth ecosystem at large.

55+ **New Family Offices Added**

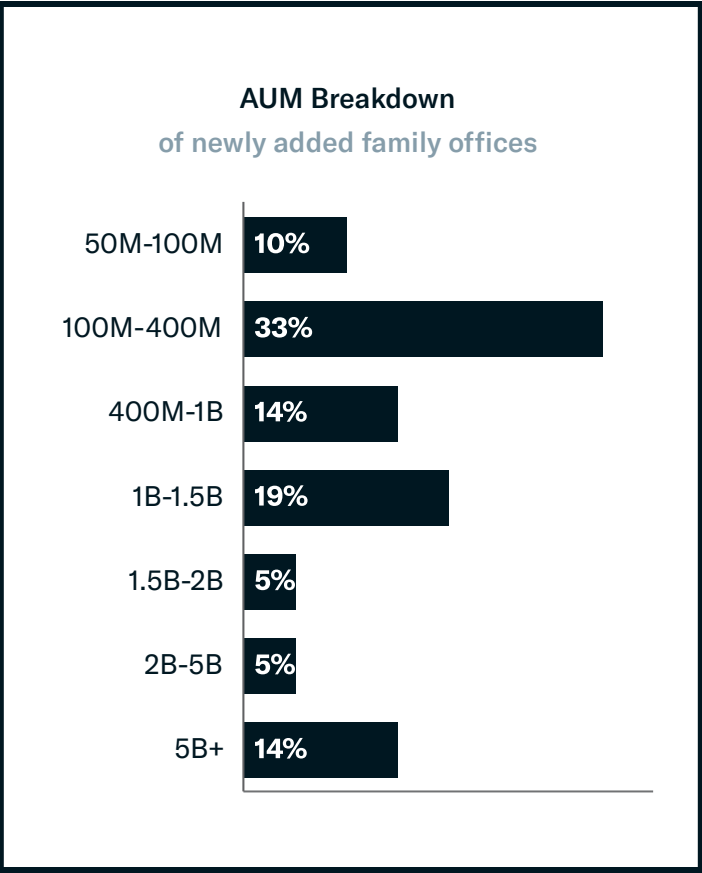
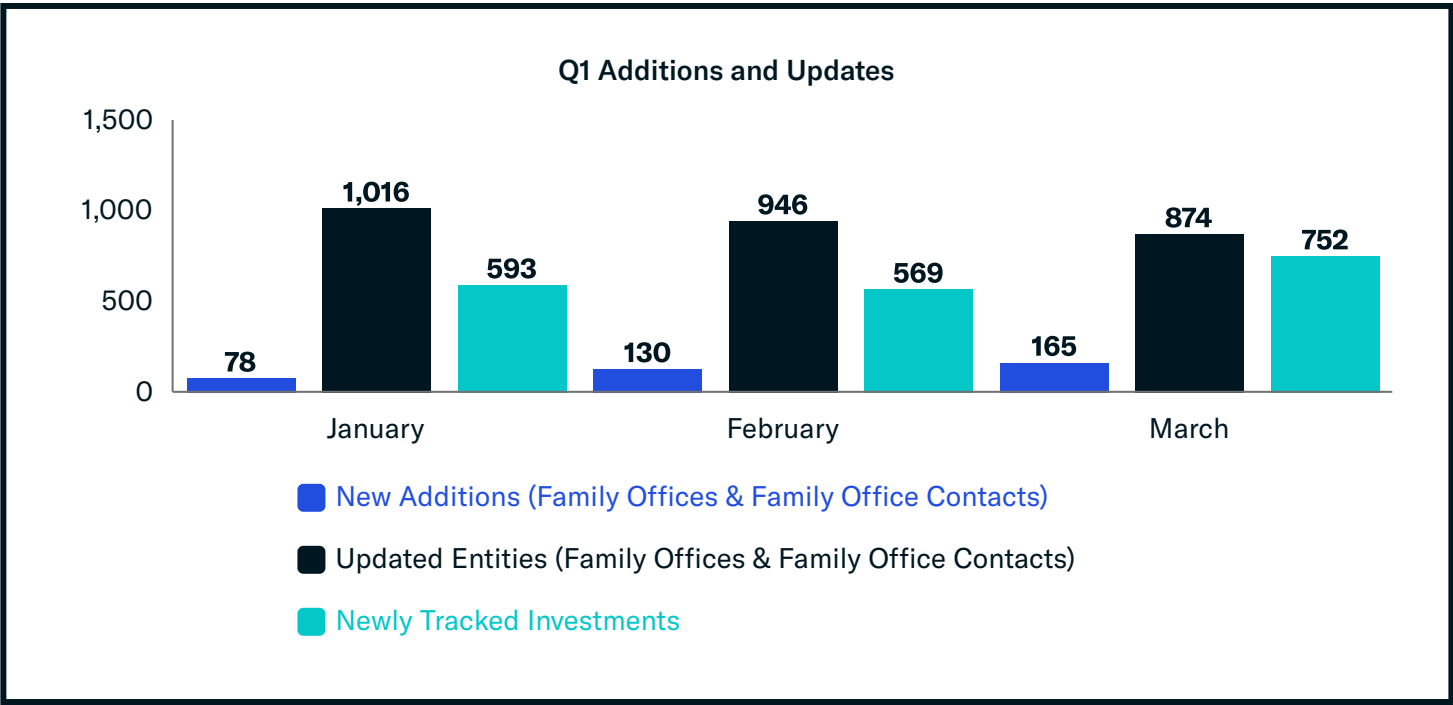
320+ **New Family Offices Contacts Added**

2,850+ **Updates Made**

2,000+ **Newly Tracked Investments**

42B+ **Total Family Office Assets Added**

Q1 Data Overview



Industry Origin of Wealth top sectors

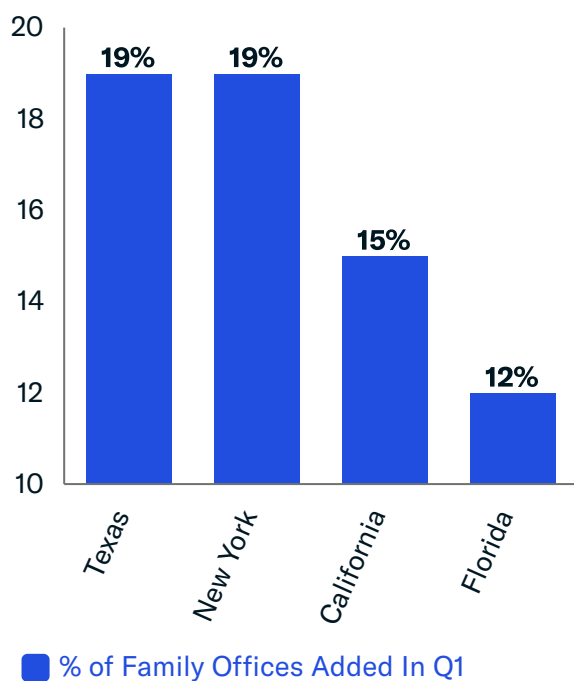
- Financial Services
- Private Investor
- Generational
- Real Estate

Several variables play a part in the types of investments family office entities make. One of the more prevalent patterns elucidated by our research is the connection between the industry of wealth origin and the industry of investment interest. As illustrated above, most family offices added to the FINTRX platform in Q1 made their wealth via financial services, private investments, generational wealth and real estate.

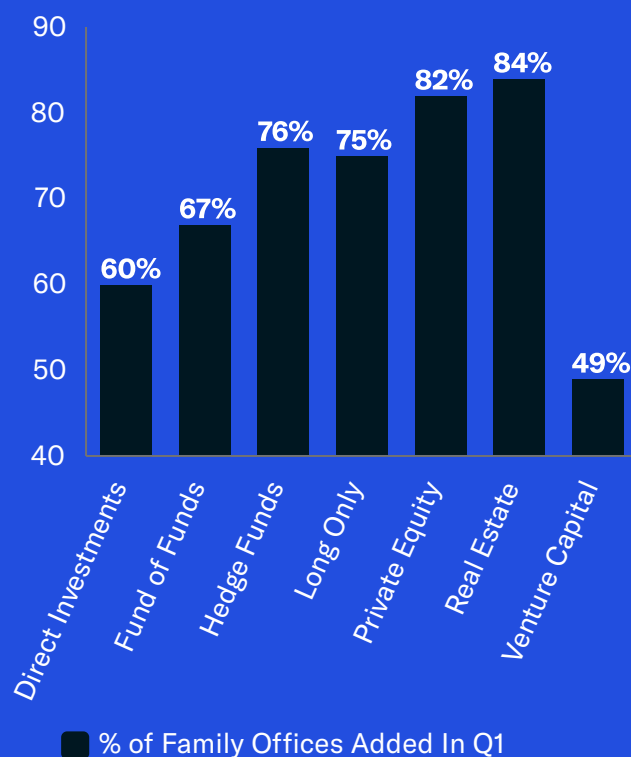


Throughout January, February and March of 2021, our analysis indicated Texas, New York, California and Florida as having the most number of family office additions.

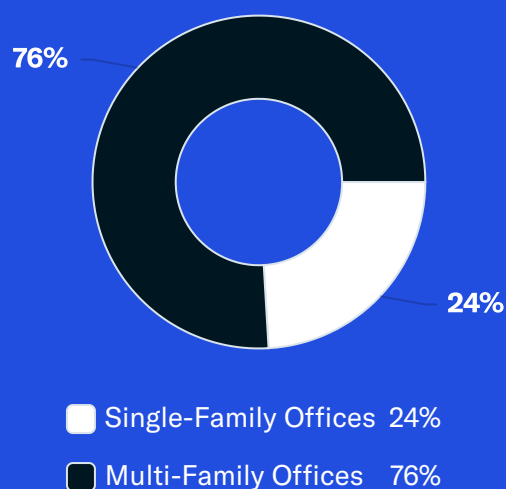
US Family Office Breakdown



Asset Class Breakdown

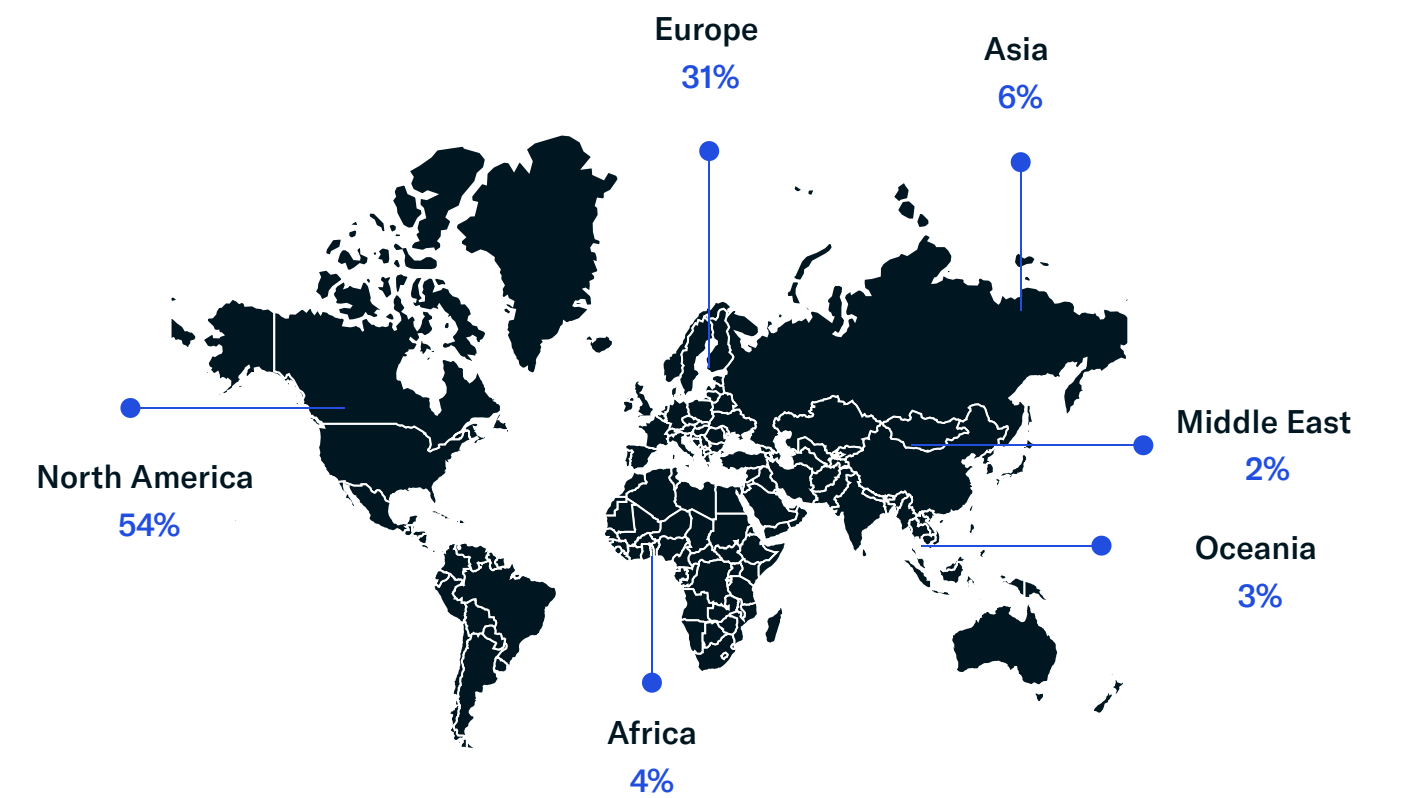


Single-Family Office / Multi-Family Office Breakdown

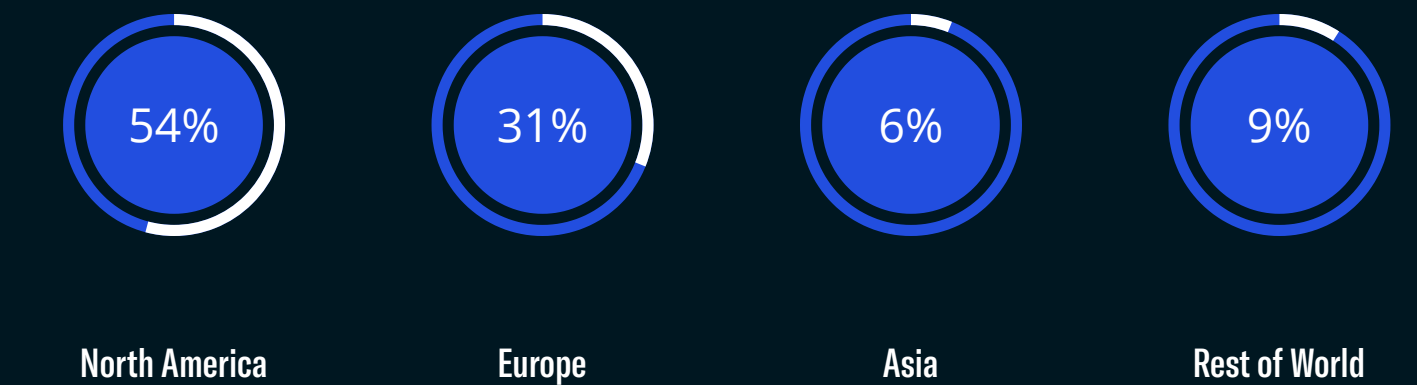


A majority of family offices added are multi-family offices (**76%**) while single-family office additions made up the remaining **24%**.

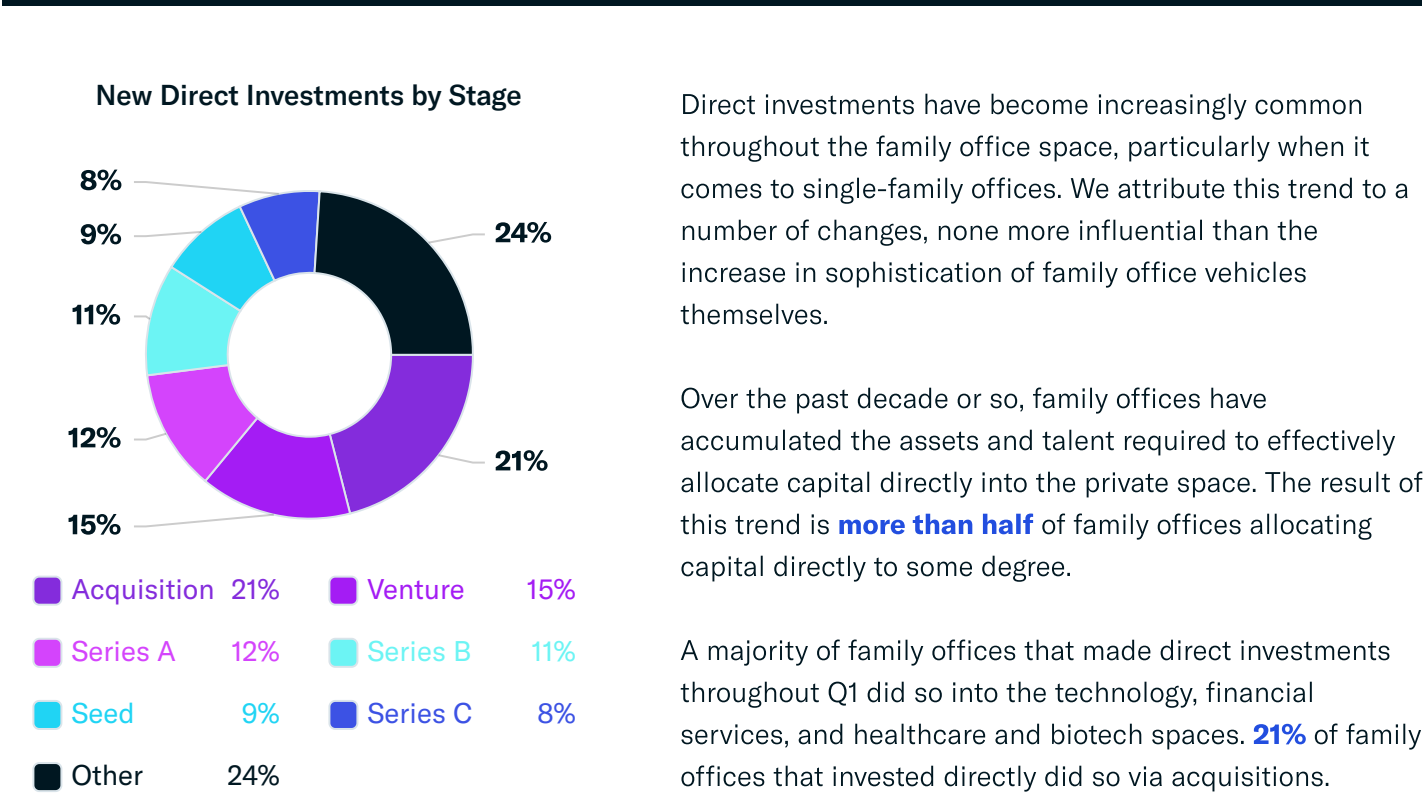
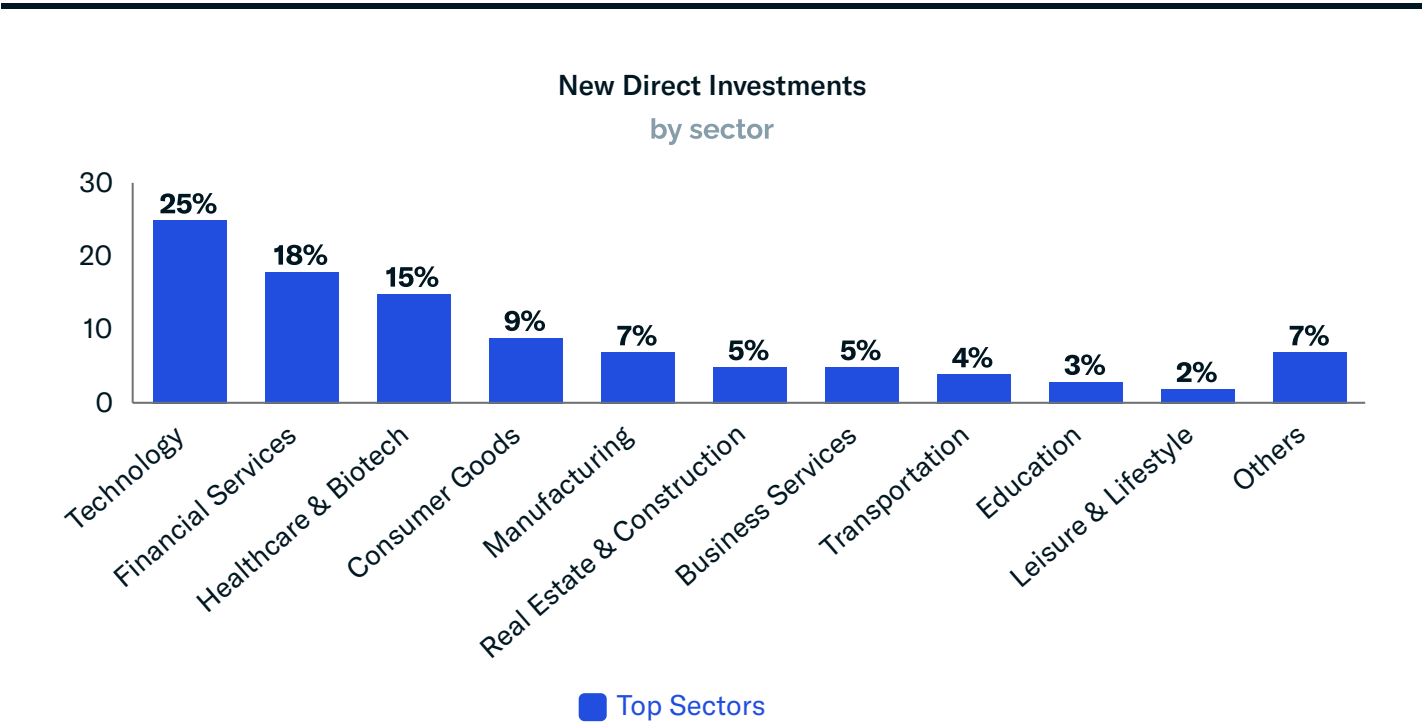
Regional Family Office Breakdown



Top Regions with New Family Office Activity

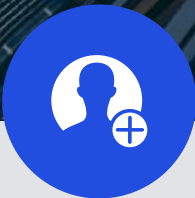


Direct Investment Breakdown



Monthly Breakdown

Notable Family Office Data Points throughout January, February and March of 2021 (via FINTRX)



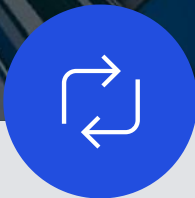
January

- New Family Office Data Points: **830+**
- Total Additions: **130+**
- Total Family Office Assets Added: **\$6B+**
- New Tracked Investments: **590+**



February

- New Family Office Data Points: **1,500+**
- Total Additions: **130+**
- Total Family Office Assets Added: **\$16B+**
- New Tracked Investments: **570+**



March

- New Family Office Data Points: **1,630+**
- Total Additions: **150+**
- Total Family Office Assets Added: **\$20B+**
- New Tracked Investments: **750+**

Conclusion

Parallel to the spike in wealth and family offices being established on behalf of ultra high net-worth individuals, the FINTRX platform maintains a strong awareness of the market and is consistently enhancing the coverage and impact of its data and research.

With their patient capital, family offices are well-positioned to capitalize on numerous opportunities arising within the current market environment.

That said, It is no secret that the family office landscape tends to be an opaque and close-guarded one, which makes our efforts both challenging and rewarding. However, through the expansion of strategic partnerships, private sourcing methods and public aggregation, we remain dedicated to providing high-quality family office intel to our global client base.

About FINTRX

FINTRX provides comprehensive intelligence on thousands of private family offices, each designed to facilitate your prospecting and capital-raising efforts. Explore in-depth profiles on each family - AUM, source of wealth, investment criteria, previous investment history, industries of interest - and other key data points to help elevate your workflow.

FINTRX offers an inside look at the alternative investment industry and private capital markets. With complete coverage on over **3,000+** family offices, **11,300+** family office contacts, and **18,300+** tracked investments, FINTRX ensures direct access to accredited investor intelligence.

The FINTRX platform is an essential tool in understanding the family office landscape in the U.S. and abroad, while also empowering users to uncover commonalities with these family offices for effective, personal outreach.

Discover the power of the FINTRX platform - schedule a demo with us today!

REQUEST DEMO

