

Retail Sites

REAL ESTATE

Retail Sites provides local, regional, and national retailers with brokerage and development services in order to grow and manage their real estate portfolio. Family offices continue to gain momentum as global wealth grows and the idea of formalizing wealth infrastructure becomes

increasingly popular amongst the many high-net-worth-individuals. To address the evolution of this opaque universe of investors, Retail Sites turned to the FINTRX family office data and research platform to gain exposure to this highly sought-after private pool of investors.

Their Challenge

Prior to leveraging the FINTRX data solution, Retail Sites had limited exposure to the private wealth space and needed a strategic plan for navigating this obscure market. **Marianne Meyers, Chief Financial Officer** at Retail Sites, outlined their initial struggles as *"cumbersome when identifying family offices making direct investments in commercial real estate development projects."* The lack of accurate and actionable information also made it difficult for the team to establish strategic partnerships with suitable investors.

Retail Sites ultimately sought the FINTRX solution to identify specific family offices best suited for their particular use-case, cut time spent, and streamline their prospecting efforts.

With consistent one-on-one help from our *"excellent customer service team"* Retail Sites successfully streamlined their capital raising efforts, allowing their team to spend less time uncovering private investors and more time nurturing new relationships.

"The FINTRX team has worked closely with us in refining our searches and using the tools available to narrow in on our target market."

The Outcome

By partnering with FINTRX, Retail Sites was able to utilize our extensive dataset of **3,700+** family offices and **19,500+** key decision-makers to parse through thousands of direct real estate transactions and identify private commercial real estate investors in North America.



Marianne Meyers

Chief Financial Officer



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...