

## 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 reaches record levels and the idea of formalizing wealth infrastructure becomes increasingly

popular amongst high-net-worth individuals. As this opaque universe of investors continues to grow and evolve, Retail Sites turned to the FINTRX family office data and research platform to gain exposure to this highly sought-after private pool of investors.

### Challenges Faced

Prior to leveraging the FINTRX solution, Retail Sites had limited exposure to the private wealth space and turned to FINTRX to facilitate a strategic plan for navigating the market. **Marianne Meyers, Chief Financial Officer** at Retail Sites, outlines their initial struggles as *"cumbersome when identifying family offices making direct investments in commercial real estate development projects."* This also made it difficult 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.

### Results

Today, Retail Sites successfully utilizes our extensive dataset of **3,100+** family offices and **15,000+** contacts to identify private commercial real estate investors in North America. With one-on-one help from our *"excellent customer service team"* Retail Sites has 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."*

**Marianne Meyers**

*Chief Financial Officer,  
Retail Sites*