

Strata Equity Group



Real Estate

Founded in 1983, Strata Equity Group is a San Diego, California-based real estate investment firm specializing in acquiring land, preparing it for development and managing existing multi-family and commercial properties. Strata gains undeveloped land to design and entitle for master planned and mixed-use communities providing a sizable supply of lots for national homebuilders. As a privately held and managed company, Strata Equity Group focuses on maximizing profits and minimizing risk for all

stakeholders in a project. The Strata team manages a portfolio of more than 90 properties and development sites across the U.S. Its experienced team has gained the full respect and trust of investors and business communities throughout the United States and Latin America. Behind the curtain, Strata Equity also has its own single-family office, Colibri Equity Management, that manages the wealth of its founder, Carlos Michan.

Challenges

With a proven track record spanning over four decades, Strata Equity Group has consistently delivered superior results to its business partners through thoughtful planning and execution. But this growth has not come without challenges. Because of the opaque nature of the private capital markets, Megan Sandler, Director of Capital Markets of Colibri Equity Management Family Office, was tasked with spearheading Strata Equity Group's investor relations efforts.

In an effort to source credible private wealth data, Sandler turned to the FINTRX family office and registered investment advisor data solution to gain credible insight and access into [3,400+ family offices](#) and [735,300+](#) investment advisors.

Results

Since becoming a FINTRX user, Strata Equity Group has dramatically enhanced its firm wide family office and investment advisor data intelligence. By leveraging the [850,000+](#) family office and investment advisor records coupled with actionable data and research tools, Strata now saves valuable time and resources when pursuing new investor opportunities.

FINTRX allows Strata Equity Group to identify and engage with appropriate family offices and RIAs, determine investment history time frames and identify contacts with the most potential to take a meeting.

Our expansive contact information on [850,000+](#) decision-makers features job titles, direct email addresses, phone numbers, common connections, alma maters, past employment history, warm introduction opportunities, detailed bios and more. This has ultimately allowed Sanders and the Strata team to increase efficiency, book more meetings and expand its network.



"FINTRX has helped us find quality information on the real families that stand behind the private family offices, and learn more about the people we are meeting with or could potentially meet with."

Megan Sandler

**Director of Capital Markets,
Colibri Equity Management Family Office**