

Wells Fargo Advisors



Asset Manager | Financial Services

Wells Fargo Advisors is a premier financial services firm serving investors worldwide through approximately 12,000 Financial Advisors and referrals from over 4,000+ Licensed Bankers in Wells Fargo branches across the United States.

Driven by a strong and abiding commitment to service, Wells Fargo Advisors help clients succeed financially with investment planning and advice designed to help them achieve their life needs and financial goals.

Prospecting into the private wealth space is highly competitive and often cumbersome, given the lack of information available. Below, we outline how Wells Fargo Advisors uses the [FINTRX Private Wealth Data Platform](#) to solve this common pain point.

Since joining FINTRX, Wells Fargo Advisors have been able to identify prospective clients, enrich their initial dialogue, and effectively nurture family office relationships.

Their Challenge

Prior to leveraging the FINTRX solution, Wells Fargo Advisors had limited exposure to the private wealth landscape and turned to the FINTRX family office data platform to facilitate a strategic plan for navigating the alternative wealth market.

Thomas Gutterman, a Financial Advisor at Wells Fargo Advisors, outlines his initial pain point as *"challenging and time-consuming when prospecting into the family office community."*

Prior to joining FINTRX, Gutterman explains, *"Sharing ideas with intelligent family office decision-makers was a slow and limited process."*

develop relationships and identify how to add value so that business opportunities can organically come to fruition.

Today, Wells Fargo Advisors successfully harness our extensive dataset of 3,600+ family offices and 20,000+ contacts to identify and build long-term relationships with single and multi-family offices worldwide.

Gutterman went on to explain his FINTRX experience, *"FINTRX has added tremendous value to my business. I have been able to create new relationships and share ideas with many smart individuals. The FINTRX platform has helped me really understand the family office business."*

"FINTRX has done the hard work of identifying single and multi-family offices across the world and bringing the information you need in order to properly engage. The information FINTRX has is extremely difficult to find otherwise."

The Outcome

Wells Fargo Advisors ultimately turned to the FINTRX solution to learn and connect with family offices, start dialogues and



Thomas Gutterman

*Financial Advisor,
Wells Fargo Advisors*



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...