



Investment Banking | Capital Markets

With roots tracing back to 1902, Ziegler is a Chicago, Illinois-based investment bank, capital markets and proprietary investments firm specializing in the healthcare, senior living and education sectors. With offices throughout the U.S., Ziegler provides its clients with capital raising, strategic advisory services, fixed income sales, trading and research to

ensure a deliberate approach to capital raising. In 1902, Ben Ziegler started an insurance business, loaning money to farmers in West Bend, Wisconsin. Over a century later, Ziegler remains committed to the people and organizations it serves. With \$24B+ of new issue debt since 2000, Ziegler is a recognized leader in not-for-profit underwriting.

Their Challenge

Navigating the alternative wealth landscape is often challenging and time-consuming, even for the most seasoned firms. The case was no different for the Ziegler investment team, who was seeking money for their newest Venture Capital fund.

When creating the fund, Ziegler ran into several hurdles that stemmed from a lack of structure and organization when reaching out to investors. Rather than continuing to use an ineffective process, Ziegler turned to the FINTRX solution, knowing its instantaneous ability to filter through thousands of family offices and contacts, ultimately saving them both time and money down the road. Not only would FINTRX enable Ziegler to identify suitable family office investments, but our solution also provides a one-stop shop to keep notes organized across their team.

The Outcome

By implementing FINTRX, Jenny Poth and her team at Ziegler were able to leverage 3,200+ family offices and contacts to help broaden their exposure across the family office market.

Having access to our platform allowed for the ability to cultivate a list of well-aligned family offices that may be interested in their investment opportunity.

On the side of creating intelligent relationships, FINTRX also removed the historic challenge of the capital-raising process based solely on preexisting relationships and little information on how a family office makes investment decisions.



"FINTRX has professionalized our family office outreach in the same way that CapitalIQ and Pitchbook did for PE and VC funds. For recent fund and capital raising efforts, FINTRX has made it easier than ever to cultivate a list of targeted, well-aligned family offices that may be interested in the opportunity."

Jenny Poth

Vice President at Ziegler

About FINTRX

FINTRX provides best-in-class data intelligence on the global Family Office & Registered Investment Advisor Ecosystem. Industry-leading financial firms leverage our powerful algorithms and expansive research team to better access the complex and rapidly changing private wealth ecosystem.

FINTRX provides comprehensive data intelligence on 850,000+ family office & investment advisor records, each designed to help you identify, access, and map the private wealth ecosystem. Explore in-depth dossiers on each family office & investment advisor. Access AUM, source of wealth, investment criteria, previous investment history, sectors & industries of interest and advisor growth signals, among other key data points.

Additionally, FINTRX provides insight and expansive contact information on 850,000+ decision-makers, featuring job titles, direct email addresses, phone numbers, common connections, alma maters, past employment history, brief bios & much more.

Best-in-class asset managers and financial services firms leverage FINTRX to map, access and sell into the global family office & registered investment advisor ecosystem.

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

Schedule Demo



FINTRX Platform Features:



Raise Capital

Identify family offices & Registered Investment Advisors that align with your fundraising goals



Unlock Your Network

Our algorithms uncover your hidden networking opportunities, driving greater rapport and warm conversations



Enrich Your Data

Our enrichment technology ensures you are armed with the most accurate data intelligence available



Market Intelligence

Monitor new hires, new capital formation, recent investments, investment interests, and much more