



Investment Banking | Capital Markets

With roots tracing back to 1902, Ziegler is a Chicago-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 & private wealth landscapes is often challenging and time-consuming, even for the most seasoned firms. The case was no different for the team at Ziegler, who was seeking money for their newest Venture Capital fund.

When creating the fund, Ziegler ran into several hurdles, particularly the lack of a centralized source of data on family offices and their investment mandates. 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 would ultimately save them both time and money down the road. Not only would FINTRX enable Ziegler to identify suitable family office investments, but it would also provide a one-stop shop to keep outreach notes and tasks organized across their team.

The Outcome

By implementing FINTRX, the team at Ziegler was able to leverage data on 3,700+ family offices and 19,500+ contacts to help broaden their exposure across the family office market. Having access to our platform allowed them to filter through thousands of family offices to easily cultivate a list of well-aligned, high potential prospects for their investment opportunities.

FINTRX also simplified the process of creating intelligent relationships--a challenging process that was historically based solely on preexisting relationships and included minimal information on family office 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 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...