

Aqua

Aqua is a New York-based alternative investment firm that specializes in private equity. As a leading financial advisory firm, Aqua empowers financial advisors to invest beyond conventional asset classes and access opportunities that are typically only

Private Equity | Alternative Asset Placement

available to large institutions and ultra-high net worth investors. By democratizing access to these opportunities, Aqua helps advisors offer their clients unique and diversified investment options that are tailored to their specific needs and preferences.

Researching and prospecting into the private wealth space can be immensely time-consuming and inefficient given the lack of information and organizational tools available. Below, we outline how Aqua utilizes the [FINTRX Private Wealth Data Platform](#) to better access private wealth data and map out the family office & RIA ecosystems.

FINTRX provided not only a valuable platform, but also exceptional service to ensure a comfortable adoption and keep users updated on new features. With the help of FINTRX, Aqua has been able to leverage the data set of over **3,700+** family offices, **39,000+** registered investment advisory firms and **750,000+** registered reps to streamline their workflow, save time, and ultimately provide better service to their clients.

Their Challenge

Prior to joining FINTRX, Aqua had been leveraging several databases to source private wealth intel to ultimately reach their goals. These goals centered around curating targeted campaign lists that would help them connect with ideal clients, researching and analyzing direct investments to provide better recommendations, and gaining a deeper understanding of specific sub-markets in the RIA marketplace.

The Results

As a result, Aqua turned to [FINTRX](#) to access its comprehensive and accurate database of financial firms and individuals, dynamic list capability, Chrome extension, HubSpot integration, and data enrichment features. With these new tools, they were able to build targeted marketing lists, find and research direct investments, and analyze specific sub-markets within the RIA ecosystem with greater efficiency and accuracy.



“The automation and simplicity of the platform is reason enough to sign up, but the true surprise is added value in the level of service that you receive.”

“FINTRX does a tremendous job of ensuring your comfortable adoption of the platform and keeping you continuously updated on new features.”

Mike Rieker

Head of Business Development, Aqua



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...