

Convergence Investments



REAL ESTATE

Convergence Investments is a Jackson, WY-based private equity real estate investment firm that specializes in Master Planned Community Development with the goal of developing land across the US into "innovative, highly-desirable planned communities" and creating "exceptional living experiences." Convergence is guided by four core

values in their business operations: timeless design, balanced environment, health & wellness, and product diversity. The firm is hands-on in their investments and utilizes a focused, niche approach to the market in order to generate high returns for their investors.

Their Challenge

As with many other capital-raising professionals, lack of time and information caused major inefficiencies for Convergence Investments when it came to fundraising within the family office sector. Matthew Lusins, Director of Business Development, expressed that their team needed a better way to *"identify and rifle-shoot the exact profiles of investors [they were] seeking for [their] next fund."*

Convergence was frustrated at the lack of access to accurate and actionable family office data, which led to inefficiencies in their prospecting efforts. They found it difficult to pinpoint the right potential investors and felt that their roadshows were ineffective, costing them valuable time and money.

Convergence Investments successfully leveraged the FINTRX platform and its *"highly informative and up-to-date"* data to advance their prospecting efforts, leading to more efficient research & networking and saving the firm valuable time and resources while uncovering the previously opaque family office ecosystem.

"Extremely effective and clean interface, highly-detailed profiles of prospective investors, all information is up-to-date."

"A very high ROI database for our firm."

The Outcome

Rather than continue to struggle with their prospecting and outreach, Convergence turned to the [FINTRX Family Office Data Intelligence Platform](#) to help break into the family office space. With hundreds of advance search filters and actionable data on 3,700+ family offices and 19,000+ key decision-makers, the team knew that FINTRX would save them both time and money in the long run and *"make [their] roadshows much more efficient."*



Matthew Lusins

Director of Business Development



About FINTRX

FINTRX offers comprehensive private wealth data intelligence on Family Offices and Registered Investment Advisors (RIA's). Our data ensures you have access to current and accurate information - driving more meetings and increasing efficiency for your business.

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.

Industry-leading financial firms leverage our powerful algorithms and expansive research team to better access the complex and rapidly changing private wealth ecosystem.

Using automation, artificial intelligence and our expansive research team, we put real-time data in your hands to ensure successful outcomes.

For further insight on how FINTRX can streamline your capital raising efforts, request a free trial below.

Schedule Demo



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