

**Hometap Equity Partners**  hometap

Hometap Equity Partners is a Boston-based fintech company founded in 2017. Their Home Equity Investment solution provides homeowners with an alternative way to tap into their home equity and gives investors access to a niche residential real estate offering. This alternative asset class offering provides

**Financial Services | Home Equity Investment**

investors unique exposure to the multi-billion dollar real estate equity market. Hometap Equity Partners has been recognized by a number of industry-leading organizations and publications including HousingWire, Fast Company, and Business Intelligence Group for their innovative home equity solution.

**Their Challenge**

As Head of Family Office Relations at Hometap, Spencer Herman faced a challenge common to the financial industry--reaching out to family offices without a focused approach. Accessing up-to-date and accurate information on this private investor class is very time consuming and difficult to uncover. This challenge, coupled with a unique asset class offering made finding the right fit for their offering crucial.

Spencer had been casting a large net and reaching out to a wide range of family offices, but without the right resources, he wasn't able to customize his approach based on their allocation preferences or asset class focus. *"I wasn't able to really narrow down my search to find the right fit for our offering, which is pretty unique."* They needed a solution that would enable them to target the right audience and establish a warm connection from the start.

*"I spend significantly less time on manual research because FINTRX automatically lets me know what interests I have in common with whoever I'm reaching out to,"* says Spencer. *"It also saves a ton of time to filter out investors who wouldn't be a fit for our asset class."* In addition, the Affinity feature has been especially valuable, allowing Spencer to take a warm approach in his outreach efforts, drawing on commonalities with thousands of contacts.

Thanks to FINTRX, Hometap Equity Partners has been able to overcome their pain point of lack of focus and streamline their outreach efforts. By leveraging the Affinity feature and accessing detailed information on **3,700+** family offices & **20,000+** contacts, they have been able to find the perfect investors for their asset class. Spencer Herman and Hometap Equity Partners are now well-equipped to make warm and meaningful connections with potential investors.

**The Outcome**

Prior to joining FINTRX, Spencer spent a lot of time conducting manual research across the family office landscape to uncover contacts at firms that would be interested in their unique offering. When choosing to use FINTRX, Hometap Equity Partners had clear goals in mind. They wanted to find family offices that would be an ideal fit and establish common ground with potential investors.

Partnering with [FINTRX](#) has proved to be a game-changer for Hometap Equity Partners, saving them valuable time by automating their research and providing insights into shared interests with potential investors.

***"There are other database platforms, but I have yet to find one with the level of detail on each family office that FINTRX provides."***



**Spencer Herman**

*Head of Family Office Relations*



## 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.

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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.

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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