

ADVISOR RECRUITING • BUSINESS DEVELOPMENT

How Integrated Financial Group Uses FINTRX to Map Advisor Networks & Accelerate Recruiting

HEADQUARTERS	FOUNDED	COMBINED ASSETS
Atlanta, GA	2003	\$11B+

Challenges

Unlike many advisor platforms that leave individual practices responsible for finding and recruiting their own talent, Integrated Financial Group (IFG) takes a more hands-on approach. IFG actively helps its member advisors build their teams, whether they're solo practitioners looking for their first support hire or established practices growing to 10–15 employees.

Alongside recruiting new advisors into its consortium, this commitment to helping existing members grow creates a unique challenge: finding qualified talent quickly and efficiently. IFG needed a platform that could turn specific hiring criteria, member relationships, and advisor movement into actionable outreach lists.

A Legacy Database That Relied on the Vendor

IFG's legacy database felt archaic to navigate. Rather than risk breaking something, [Jason Bokina](#), IFG's Director of Marketing & Communications, sent search requests to a contact at the vendor instead of running them himself.

Every Hire Comes With Its Own Criteria

Member advisors regularly ask for service advisors, investment analysts, paraplanners, or younger advisors ready to leave a big-box firm, each with its own requirements for experience and location.

Referrals Without a View of the Network

Most advisors are introduced to IFG through referrals from current members. Without data on those members' networks, finding the next introduction meant asking busy advisors to recall who they know.

A Competitive Market for Advisor Talent

Moving an advisor away from a wirehouse or another independent firm is a long process in a competitive market, which makes it valuable to reach the right candidates early.

ABOUT THE FIRM

Atlanta-based [Integrated Financial Group](#) (IFG) is a consortium of independent financial planners dedicated to leading the fiduciary standard for investment and wealth management. Since 2003, IFG has offered premium business support services, regulatory compliance oversight, business consulting, and professional coaching to help advisors reach their full potential.

Day to day, IFG's culture is built around collaboration. Its Brain Trust integrates the wisdom and experience of tenured advisors with fresh ideas from younger ones through peer-to-peer sharing and mastermind groups. IFG's 100+ advisor members own businesses across 12 states, totaling more than \$11 billion in combined assets.



Why They Chose FINTRX

Jason has worked with several advisor data platforms over the years. When IFG came on board in 2026, three things set FINTRX apart: detailed [RIA intelligence](#) to support the firm's [recruiting](#), an intuitive interface with native [FINTRX AI](#) so the team can build and run searches on its own, and 24/7 account support. But above all, it came down to data quality.

“It all starts with the data. Do we have good data? That’s sort of the heart of it, where it all starts. And your tool, from a UI/UX standpoint, is just way more advanced, easy to use — just really night and day different from a user experience.”



Jason Bokina

DIRECTOR OF MARKETING & COMMUNICATIONS, INTEGRATED FINANCIAL GROUP

Results & Impact

With FINTRX data feeding its outreach, IFG spends less time finding candidates and more time engaging them. The team has shortened the path from hiring criteria to candidate conversations, started turning member networks into a recruiting channel, and opened new lists built around advisor movement.

01 A Raleigh Hire in Under a Month

A member advisor in Raleigh, North Carolina needed a paraplanner or service advisor. Jason started by working with the advisor to define the right job description, then entered the criteria in FINTRX, including years of experience and location, to build a list of a few hundred candidates who looked good on paper. He worked through the list in about three weeks. As Jason put it, *"We found probably about ten solid candidates, made an offer and then closed that chapter pretty quickly."* He has since run the same process for several other member advisors.

02 315 Connections and 63 Replies in Under Two Months

Referrals from current members are how most advisors find IFG. Using FINTRX's [relationship mapping](#), IFG mapped one member advisor's connections to about 800 advisors nationally, without asking him to recall who he knows. Business development leads the outreach and loops the member in once there is engagement. In less than two months, the campaign connected IFG with 315 people and generated 63 replies.

03 Targeting Advisors Moved by M&A and Private Equity

The team uses FINTRX's rep movement data to build lists of advisors affected by a firm sale or private equity investment, focusing on every advisor underneath the owner. Because these advisors may not have participated in choosing the change, many may be open to a new home. IFG is now building a similar list of solo advisors approaching succession, filtered by age and stage of business.

04 Conversational Search With FINTRX AI

Where he once routed searches through a vendor contact, Jason now builds them directly with [natural language searching](#). He can type or speak what he is looking for, and the AI builds the list without intricate filters. According to Jason, *"If I don't feel like typing or clicking around, I can just talk."*

05 Support Whenever the Team Needs It

With FINTRX's 24/7 support, IFG gets fast answers whenever a search or list needs a second look, keeping outreach moving without delays. Jason has a direct line to the FINTRX team for questions on filters, data, or new list ideas, so the team can run a wide range of searches without slowing down.

AI-Powered Data Intelligence on RIAs, Broker-Dealers, Family Offices, Advisor Teams, and More

FINTRX is an AI-powered private wealth intelligence platform that connects every family office, RIA, and broker-dealer to the people, portfolios, and decisions behind them. Asset managers, alternative fund managers, recruiters, RIA aggregators, and fintech providers use FINTRX for fund distribution, capital raising, advisor recruiting, and lead generation. Coverage spans 850,000+ professionals

across 46,000+ RIA and broker-dealer firms, 4,600+ family offices, 28,000+ wealth teams, 1,900+ banks and trusts, and 1,500+ endowments and foundations. FINTRX AI and Fin, the FINTRX AI agent, deliver that intelligence through natural-language search, email, Slack, Microsoft Teams, calendars, and CRM integrations.

SOLUTIONS

Asset Managers & ETF Issuers

Target the advisors already allocating to your strategy. Portfolio-level intelligence means every outreach lands with context, not cold.

[LEARN MORE](#)

Alternative Fund Managers

Reach family offices and institutions with verified mandates before the round closes. Engage with LPs aligned with your strategy.

[LEARN MORE](#)

Recruiters & RIA Aggregators

Track rep movement, custodian switches, and book size across 400K+ advisors. Recruit and acquire ahead of the market, not behind it.

[LEARN MORE](#)

FinTech & Service Providers

Fill pipeline with highly aligned prospects, enriched with verified contact information and buying signals your team can act on.

[LEARN MORE](#)

BY THE NUMBERS

46,000+

RIA & BROKER-DEALER FIRMS

802,000+

REGISTERED REPS

4,600+

FAMILY OFFICES

28,000+

WEALTH TEAMS

**CAPTRUST**

INDEPENDENT RIA | RALEIGH, NC

VERIFIED

EST. AUM

\$1.2T

CONTACTS

802,000+

OFFICE LOCATIONS

201

ALLOCATION INTERESTS

FY 2026

■ Private Equity ■ Real Estate ■ Venture ■ Credit

New Acquisition: Stillwater Capital Advisors (MAY 2026)

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