

Safe Harbor Distribution



Founded in 2017 by CEO Chris Quigley, Safe Harbor Distribution is a leading financial services company based in Pennsylvania. Under Quigley's astute leadership, the company has successfully distinguished itself as a premier single source of investment products for financial advisors. Safe Harbor prioritizes building close relationships with

Capital Markets

boutique investment managers and has developed an extensive network through which it offers financial advisors a wide variety of investment products, including mutual funds, annuities, ETFs, and separately managed accounts (SMAs) to meet the unique needs and requirements of their clientele.

Their Challenge

The investment industry can often be an immensely competitive and challenging market to sell into. According to Chief Marketing Officer, Christopher Silvaggi, Safe Harbor Distribution faced the challenge of obtaining *"access to accurate financial advisor contact information"*, which is a common issue in the financial services industry.

Without reliable data on key decision-makers, companies often struggle to effectively reach out to financial advisors which, in turn, makes it difficult to promote investment products and grow their business. Safe Harbor recognized that they needed a more efficient way to obtain this information and stay ahead of their competition.

The Outcome

To overcome this challenge, Safe Harbor turned to the [FINTRX Private Wealth Data & Research Platform](#), a leading provider of family office and financial advisor data intelligence. The comprehensive and accurate data provided by FINTRX enabled Safe Harbor to quickly uncover and access the most suitable financial advisors, key decision-makers and investment committee members, empowering them to book more meetings and build better, long-lasting relationships.

The ability to stay informed on prospects with timely [news alerts and notifications](#) also proved to be a game-changer for Safe Harbor, as these actionable tools allowed them to better understand the market and maintain a competitive edge.

By leveraging FINTRX's extensive dataset of **39,000+** registered investment advisory firms and **750,000+** registered reps and its sophisticated tools such as 13-F holdings & custodian information, Safe Harbor was able to gain valuable insights and research to help streamline their sales process. Safe Harbor continues to utilize FINTRX to increase their sales efficiency and meet their goals.

"I have been able to filter. . .to create a base list and then use targeted filters to supply each of our regional wholesalers warm leads."

FINTRX has provided us with the tools to target our sales opportunities, and the support from the [FINTRX] team has shortened the learning curve."



Christopher Silvaggi

Chief Marketing Officer
Safe Harbor Distribution



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...