

## Sandpiper Lodging Manager



## Real Estate

Sandpiper Lodging Manager, LLC is a Virginia-based company that manages and owns more than 50 midscale and economy extended-stay hotels. Since their inception in 2012, Sandpiper has quickly become a household name in the hotel business and continues to see

substantial growth through various development and acquisition opportunities. The company as a whole attributes much of their success to an exceptional leadership team of like-minded individuals that have the experience and attitude to be the best in the market.

## Their Challenge

As is common in the private wealth sphere, the team at Sandpiper Lodging Manager was having trouble sourcing data on investors to prospect into. Since information on family offices, investment advisors and industry professionals is often outdated and sparse, it can be difficult trying to pinpoint relevant firms to reach out to in the process of raising capital.

Michael Helgeson, Vice President of Capital Markets at Sandpiper, faced this exact challenge of being able to target the right family offices and RIAs. The Sandpiper team felt they were often wasting their time, unable to narrow down their search to investors that would actually be interested in their asset class offering. The team was spending numerous hours calling individual reps and firms to get an understanding of their investment interests, only to find that they were unwilling to entertain real estate opportunities.

In an effort to save valuable time and create a more targeted approach to family offices and RIAs, Michael and the Sandpiper team turned to FINTRX.

## The Outcome

In partnering with [FINTRX](#) to leverage the vast dataset of family offices, investment advisors and key contacts, Sandpiper was able to easily streamline their prospecting and outreach processes.

FINTRX provided Michael and his team with a one-stop shop for RIA and family office data. By leveraging the millions of data points, [375+](#) unique search filters and user-friendly workflow tools, Sandpiper was able to form a more targeted approach, focused on investors active in their real estate asset class. Filters such as [office location](#), firm [assets under management](#) and [investment preferences](#) helped the team to quickly dig through thousands of entities to pinpoint potential investors, and the phone numbers, email addresses, and direct links to websites and LinkedIn profiles allowed them to make instant connections with key decision-makers.

FINTRX continues to support Sandpiper, providing all of the data, tools and customer service needed to efficiently navigate the private wealth landscape.

*“Smooth, efficient, and customer-service oriented.”*

*There is “no other provider that offers all of the RIA & Family Office data we were seeking in one, user-friendly platform.”*



**Michael Helgeson**

*VP of Capital Markets*



## 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