FINTRX

CUSTOMER CASE STUDY

Sovereign's Capital

Sovereign's CAPITAL

Private Equity | ETF Issuer

Founded in 2012, Sovereign's Capital is an Atlanta, Georgia-based investment firm with a broad spectrum of offerings. It operates across several asset classes, including Public Equity, Private Equity, Venture Capital, Real Estate and Fund of Funds, and has recently expanded into ETF strategies. Sovereign's Capital distinguishes itself through its five main practice areas: Targeting profitable lower-middle market companies with $10 million to $100 million in revenue and $3 million to $20 million in owner's earnings; investing directly in promising, early-stage tech across Seed and Series A stages; Investing in publicly-traded companies; and lastly, leveraging a fund of funds approach to tap into venture and private equity through primaries, secondaries, co-investments and GP stakes. This strategic diversification underscores the firm's adaptability and commitment to seizing an array of investment opportunities.

Their Challenge

Navigating the vast landscape of over 750,000 registered financial advisors can be a daunting task. For Sovereign's Capital, the challenge was not only identifying the right contacts but also building meaningful relationships with advisors who aligned with their new ETF strategy. They recognized the importance of leveraging factors like backgrounds, passions, interests, and societal affiliations to forge warmer connections.

In a world where accuracy and comprehensiveness are paramount, FINTRX proved to be the solution Sovereign's Capital was seeking. With FINTRX RIA Data, professionals can tap into a robust database that provides not only a wealth of information on RIAs but also crucial insights into their decision-makers and key executives. Armed with this comprehensive and accurate data, users can efficiently target the right decision-makers, build stronger relationships, and optimize resource allocation.

A notable standout advantage of the FINTRX platform is its capacity to navigate the extensive network of financial advisors with remarkable efficiency. With 375+ filtering capabilities and ongoing support from the Client Success and Account Management teams, Sovereign's Capital can quickly identify the most valuable contacts, optimizing their use of time and resources. As a result, Sovereign's Capital has been able to concentrate on establishing meaningful connections that align with their objectives.

By leveraging FINTRX's Smart Bios and Affinity feature, Sovereign's Capital gained a competitive edge in their outreach efforts. Armed with credible information on advisors' backgrounds, alumni roots, societal affiliations and charitable involvements, the firm can now personalize conversations and establish immediate rapport. This approach facilitates warm conversation starters and fosters connections built on shared interests and experiences.

Why FINTRX?

Sovereigns Capital was searching for a comprehensive solution within the RIA ecosystem that would enable their team to accurately identify and engage with the right advisors. **After considering several options, including Discovery Data, AdvizorPro, and RIA Database, the firm ultimately decided on FINTRX as their preferred choice.**

Sovereign's Capital opted for the FINTRX platform due to its compelling mix of factors, including, *"Ease of use, power of the platform & phenomenal team"*, says Hank Bowen, an Associate of the firm. Recognizing the user-friendly experience and robust features offered by FINTRX, Sovereign's Capital found unparalleled capabilities at their fingertips.

"After evaluating several top data providers — choosing FINTRX was easy. Their tools, interface, & data management are unmatched & the team is world-class."

Hank Bowen

Associate, Investor Relations
Sovereign's Capital

FINTRX

About FINTRX

FINTRX is a unified data and research platform, offering extensive data intelligence on 850,000+ family office and investment advisor records, designed to enhance industry professionals' ability to access, map and engage with the global private wealth ecosystem.

With an extensive database of 4,000 family offices, 20,000 family office contacts, 37,000 RIAs and 750,000 registered reps, the FINTRX database offers unparalleled access to accurate and actionable information. Equipped with 375+ search filters, FINTRX allows you to seamlessly track the flow of private capital, uncover allocation trends and break down investment data. Our mission is to empower financial professionals by equipping them with the tools and insights needed to effectively engage and connect with potential investors.

FINTRX goes beyond basic contact details, providing in-depth profiles that include investment preferences, asset allocations, historical investment activity and so much more. This allows users to target the most relevant prospects based on specific criteria such as investment strategies, geographies and asset class preferences.

At FINTRX, we remain committed to providing exceptional customer support and ensuring our users have the resources they need to succeed. Join us and experience the transformative power of FINTRX. Together, we can navigate the complexities of the private wealth market and unlock new opportunities for growth and success.

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

Schedule Demo

New Platform Tools & Enhancements

Proprietary Private Wealth Group Dataset

Access 14,000+ private wealth teams and 60,000+ reps within wirehouses & independent aggregators.

AI-Powered Search

Experience a new level of search efficiency that understands and processes your natural language queries, delivering relevant results in seconds.

FINTRX 360° LinkedIn Integration

Enrich your LinkedIn experience with the power of FINTRX 360°. Boost networking, build valuable connections, and drive business growth.

Google Chrome Extension Plugin

Access FINTRX family office & RIA data directly in your browser. Increase efficiency and identify prospects with ease.

Monitor Advisor ETF & Equity Portfolios

Track 13F investment advisor portfolios and uncover key sales opportunities for your firm.