FINTRX

CUSTOMER CASE STUDY

U.S. Realty Advisors

USRA
U.S. REALTY ADVISORS

Real Estate

U.S. Realty Advisors (USRA) is a leading net lease real estate investment & asset management firm specializing in sale-leaseback and build-to-suit financing arrangements. The firm seeks to deliver value for their underlying investors while also helping companies free up capital and retain operational control over their facilities. Since its inception in 1989, USRA has worked with institutional and wealth-oriented investors & currently has $6.5B in assets under management. With the goal of scaling their business & expanding market penetration, USRA recognized the need for a data-driven approach to efficiently target the optimal group of investors. Operating as a nimble team, they sought a solution that would better equip them to focus their efforts and achieve high-level growth.

Their Challenge

Scaling a business and achieving high-level growth is always a challenge, especially while maintaining a leaner team. As a net lease real estate-focused investment firm, USRA was faced with this very task, seeking to find the right investors to expand their network of LPs. The team needed a solution that would provide them with accurate and comprehensive data on their target market: family offices and RIAs. Additionally, it was crucial to USRA to find a data solution that integrated directly with their existing workflow, allowing their team to remain lean and efficient while navigating the private wealth landscape.

In their search for an effective data provider, FINTRX stood out as the ideal solution, offering a data-driven approach that would enable USRA to efficiently target family offices and RIAs with an emphasis on real estate fund and deal allocators. With data enhanced through native sales enablement tools such as Affinity relatability scoring and AI-powered search functionality, FINTRX would allow them to strengthen their prospect targeting efforts.

The Outcome

By partnering with FINTRX, the team at U.S. Realty Advisors has gained access to millions of actionable data points on potential prospects and business opportunities within the family office & RIA spaces. With over 4,000 family offices, 40,000 RIAs and 850,000 associated contacts & key decision-makers, FINTRX has empowered USRA to easily identify and connect with target LPs.

On top of high quality data, the integration of FINTRX with the firm's native CRM, Altvia, has been a game-changer for USRA. The real-time data updates and focus on real estate allocators within the platform have saved the team a significant amount of time and effort. In addition, the mobile functionality of the platform and AI Search tools have empowered USRA to execute their day-to-day efforts efficiently, regardless of their location in the field.

Finally, USRA has been extremely pleased with the exceptional support provided by the FINTRX team. Quick response times and custom reporting assistance continue to be a tremendous help for the firm, allowing them to work more efficiently and focus on their asset-raising goals. With FINTRX as *"an extension of [their] team and sales efforts"*, USRA has never been more equipped to tackle the private wealth space and scale their business.

FINTRX is the gold standard for GPs looking to efficiently and effectively scale their businesses."

Justin Arasin

Head of Capital Formation & Product Development at USRA

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.

Investment Advisor Firm Movement Tracking

Keep tabs on industry movements for RIA reps of interest based on changes in CRD number associations.

Monitor Advisor ETF & Equity Portfolios

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