

## Valiant Finance



Valiant Finance, an affiliate of Exemplar Companies, is a specialized investment firm offering innovative solutions to sophisticated investors. Led by a team of industry veterans, the firm manages a family of funds focused on differentiated strategies such as litigation finance, life sciences, and tax-advantaged investments. Valiant Finance's relationship-driven

## Structured Financing

approach is central to the firm's success. By leveraging deep domain expertise, the Valiant team is able to identify compelling opportunities and forge lasting partnerships with its investor base. This enables them to structure specialized investment products designed to deliver attractive risk-adjusted returns in complex alternative asset classes.

## Their Challenge

As a financial services firm, Valiant Finance faced the challenge of efficiently accessing the comprehensive information on investors and key contacts needed to identify and connect with the right prospects for their innovative investment products. The team required easy access to accurate data in order to support their day-to-day operations and long-term success.

When researching data providers to help them overcome these challenges, Valiant's primary goals were to streamline their workflows and to gain access to comprehensive and reliable data on family offices, registered investment advisors and other private wealth groups. FINTRX's ability to provide high-quality data, [direct CRM data integration](#) options and exceptional customer support were the driving factors that ultimately led Valiant to choose FINTRX as their preferred data intelligence solution.

In addition, Valiant Finance has been consistently impressed by the responsiveness and expertise of the FINTRX customer support team. Whether it's been building custom prospect lists, ensuring a smooth migration of data into HubSpot, or providing guidance on best practices, the FINTRX team has been there every step of the way.

Highlighting the exceptional support he has received, Senior Vice President Michael Zarlengo praised his dedicated FINTRX Client Success Manager, Sarah, saying, *"The assistance that I have gotten from Sarah is awesome. She responds quickly and is very knowledgeable."* This high level of personalized service has enabled Valiant Finance to truly maximize the value of the FINTRX platform.

## The Outcome

By partnering with FINTRX, the team at Valiant Finance has gained access to millions of private wealth data points, including over 4,000 family offices, 40,000 investment advisors and 850,000 associated decision-makers. The [seamless integration](#) between FINTRX and Valiant's existing HubSpot CRM system has been a game-changer for the firm. The automatic data syncing between the two platforms has allowed the team to dramatically streamline their day-to-day operations and focus more of their time and energy on building meaningful relationships with their target investors, rather than getting bogged down in manual data entry and management tasks.

*"I would absolutely recommend FINTRX. The ease of use and the exceptional support from the team are key benefits that set FINTRX apart."*



**Michael Zarlengo**

Senior Vice President  
Valiant Finance



## 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 **20,000+** private wealth teams and **80,000+** 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.