FINTRX

CUSTOMER CASE STUDY

Victory Capital Management

Separately Managed Accounts | ETFs

Founded in 1894, Victory Capital Management (VCM) is a global asset management firm with a unique business model that combines boutique investment qualities with a fully integrated operating and distribution platform. With eleven autonomous investment franchises, each with its own culture and approach, Victory Capital offers specialized investment strategies to institutions, intermediaries, retirement platforms and individual investors. Their Solutions Platform features the VictoryShares ETF brand, designed to offer cutting-edge investment options aimed at improving outcomes for investors. VCM offers a diverse range of investment options including actively managed mutual funds, separately managed accounts, ETFs, multi-asset class strategies, custom solutions, and a 529 College Savings Plan. Headquartered in San Antonio, Texas, they have offices across the United States and investment professionals in London, Hong Kong, and Singapore. Victory Capital is dedicated to delivering superior investment outcomes and driving success for its clients through its innovative approach and global presence.

Their Challenge

Scaling efficiently across the private wealth landscape, particularly within the RIA segment, posed significant challenges for VCM. Without the right tools and insufficient data, the group struggled to navigate the complex market and achieve their growth objectives. Access to digestible and accurate data emerged as a top concern for VCM. They recognized the critical role of efficient data management in their overall strategy, highlighting the need for a solution that could provide comprehensive and reliable information.

The transition from Discovery to FINTRX was driven by the desire for improved service level and support, recognizing that the success of any data intelligence platform hinges on the quality of support provided. VCM sought a partner that could offer exceptional customer support, ensuring a seamless onboarding process and ongoing assistance throughout their partnership.

The Outcome

At FINTRX, we pride ourselves on delivering exceptional service and understanding the importance of a smooth transition when adopting new technology solutions. By addressing VCM's challenges head-on and providing personalized assistance, we have helped them overcome scaling obstacles and unlock new opportunities in the private wealth landscape.

Paul LeBlanc from Victory Capital describes the transition as follows: *"Overall, the client service and support is exceptional and the best I have worked with in 20+ years in the business."* This testimonial emphasizes our commitment to providing outstanding service.

Today, VCM has full access to 4,000+ single and multi-family offices and 40,000+ Registered Investment Advisor firms. This extensive network has empowered VCM to broaden their connections and deepen their market understanding.

With FINTRX, VCM has the tools to unlock new opportunities and drive the business forward. They can easily navigate industry complexities, identify prospects, and optimize their strategies using our advanced search capabilities and integration options.

Notable products the VCM team utilizes include territory data enrichment through user imports, location filtering at HQ and branch levels, ETF competitor reporting and the ability to analyze asset exposure across ETFs, Mutual Funds and SMAs.

Our mission is to empower VCM with actionable insights, enabling informed decisions and propelling their strategies forward. Together, we forge a partnership rooted in shared success, paving the way for VCM's continued excellence in the years to come.

"The experience with FINTRX has been fantastic, they have partnered with us to meet our exact needs to help focus our sales efforts within the RIA channel."

Paul LeBlanc

Business Development - Key Accounts, VCM

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.

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.