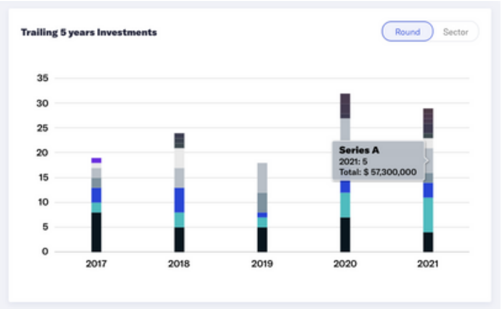
FAMILY OFFICE & RIA DATA INTELLIGENCE

10 Ways to Utilize FINTRX to Better Access the Family Office & Registered Investment Advisor (RIA) Ecosystem

1. Family Office & RIA Data Intelligence Optimized For Fundraising

Family office and investment advisor data for fundraising has never been easier to access. Using automation, artificial intelligence and our expansive research team, we put real-time, dynamic data in your hands to ensure successful outcomes. Pinpoint relevant decision-makers in a snap with powerful search filters and queries. Filter through areas of investment interest, AUM, asset flows, intent signals, potential associates and more.



Key Characteristics:

- Access to 375+ advanced search filters & query options
- 'Smart Lists' technology keeps your data accurate, organized and up-to-date
- Fully customizable alerts & notifications sent directly to you

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2. Direct Investment Activity Tracking

FINTRX empowers clients to monitor where family office and RIA capital is deployed and offers clear insights into recent investment activity within the private wealth ecosystem. Uncover where investment dollars have been allocated historically and intent signals on where future investments may land. Optimize your time uncovering and speaking to like-minded and interested investors in your sectors & product offerings.

Key Characteristics:

- Identify where family office & investment advisor capital is flowing
- Track investment activity by sector & funding round size
- Pinpoint investors seeking to allocate capital
- Explore historical investment trends and uncover future outlooks

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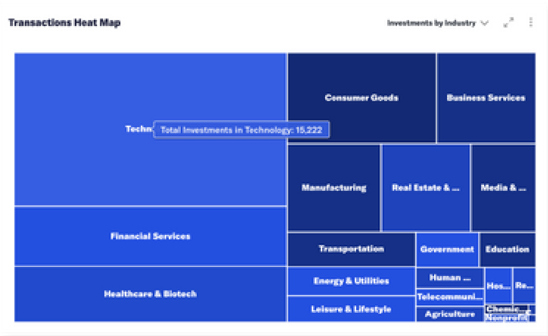

3. Contact Details for 850,000+ Decision-Makers

FINTRX provides expansive contact information on 850,000+ private wealth key contacts, featuring job titles, direct email addresses, phone numbers, common connections, employment & education history, brief bios and more. Our comprehensive data on influential family office & RIA professionals ensures a measured approach to making meaningful connections in the private wealth sphere.

Key Characteristics:

- Accurate contact details ensure efficient research & prospecting
- Multiple points of contact for each decision-maker
- Ability to build multi-channel contact strategies & personalize your outreach
- Thousands of contact updates monthly

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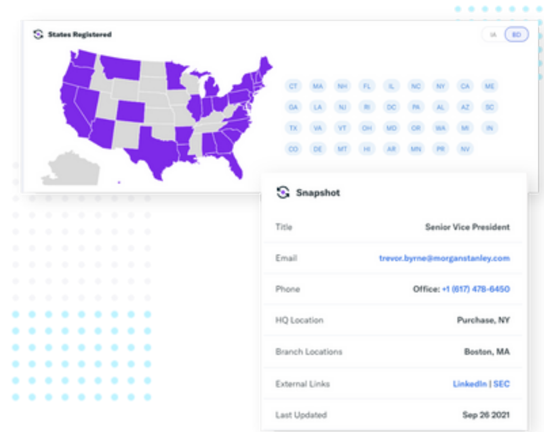
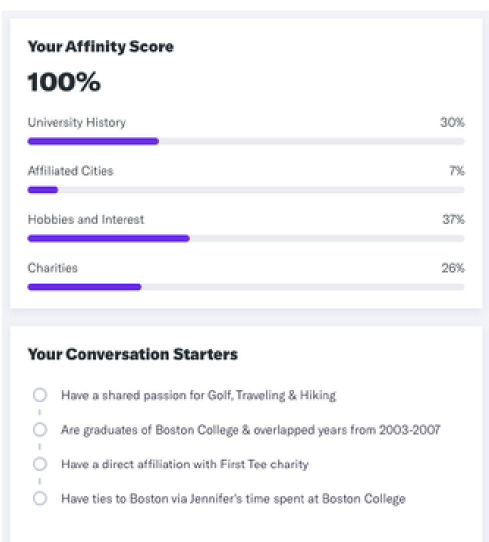


4. Contact Relatability Scores Specific to You

Delivered through our Affinity module, FINTRX contact relatability scores are designed to humanize your outreach with like-minded investors. Access custom conversation starters, actionable insights to connect, and meaningful intel on your shared commonalities across 850,000+ family office & RIA contacts. Our relatability data arms you with the intel you need to engage prospects, build better rapport and drive connectivity.



Quickly parse through thousand of investors to determine the individuals you relate to the most.

Key Characteristics:

- Uncover shared commonalities with 850,000+ family office & RIA contacts
- Utilize custom conversation starters to build stronger dialogues
- Leverage AI to unlock hidden networking and warm introduction opportunities
- Automatically runs & refreshes every night

Affinity Video Tour >>

Learn More About Affinity >>

5. Fully Customizable Alerts & Notifications

Users have the ability to customize their FINTRX alert settings for maximum efficiency and organization in their daily workflows and accross their team. Our custom alert builder allows for a simple, user-friendly setup, keeping you dialed into vital information and changes within the private capital markets. Never miss an important update or touchpoint again.

Key Characteristics:

- Fully customizable notification content, scheduling & delivery
- Alerts on contact & entity updates sent directly to you or in-app
- Configure your notifications based on your current priorities

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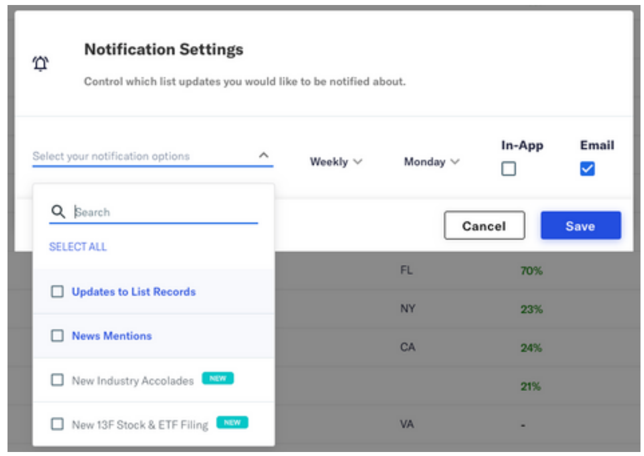
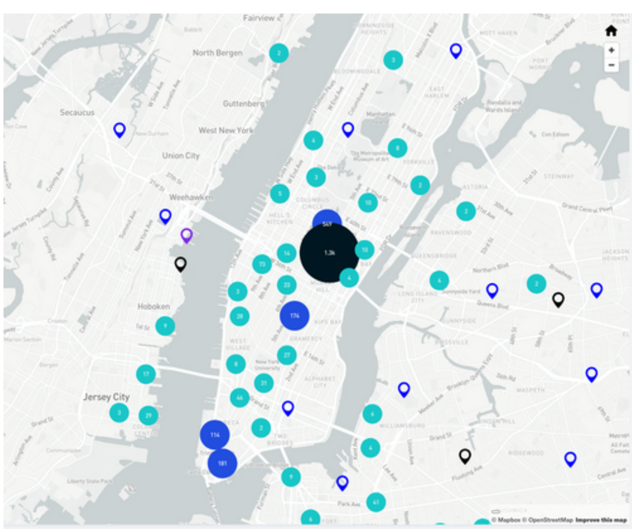


6. Visual Map Search with Street-Level View

Easily visualize the most comprehensive family office and investment advisor database by leveraging our map view technology - an interactive global map showcasing family offices and registered investment advisor firms down to their street-level view.



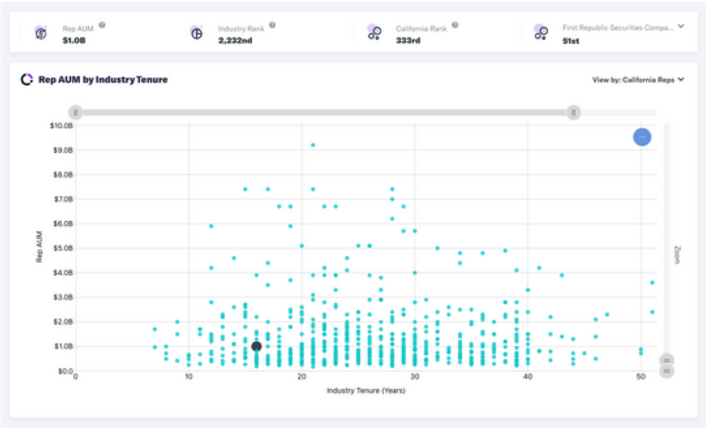
Rather than limiting your search to one city or zip code, FINTRX will generate all firms within a five to 100-mile radius. Pinpoint areas of interest on a macro or a micro level to streamline your travel preparation.

Key Characteristics:

- View surrounding family offices & contacts within up to 100 miles of your desired search area
- Easily create lists of different regions to stay organized
- Visualize search results down to the street level
- Optimize your travel by easily mapping out firms of interest

7. Expansive Investment Advisor AUM Coverage

Explore private funds advised and allocations to fund investments - each with insights into holdings and asset class exposure. Break down investments over time and uncover trends in asset flows and geographic attributions. Explore individual rep AUM and uncover top-performing investment advisors across the globe.



Key Characteristics:

- Expansive AUM details to help you uncover relevant firms and the contacts behind them
- Easily search and create cohorts based on managed asset value
- Access books of business for top-performing reps
- Powerful visual ranking & analysis tools

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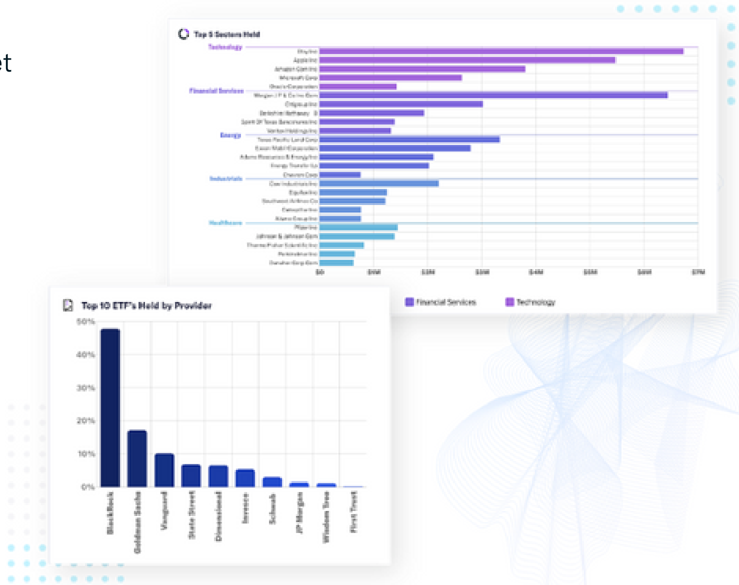
8. In-Depth ETF & Equity Portfolio Analysis

Tracking 13F investment advisor holdings and uncovering key sales opportunities has never been easier. Empower your team with a clear picture of RIA portfolios.

Track changes in ETF and equity holdings over time and set alerts to stay on top on updates, trends, asset movement, and new prospects to target.



Key Characteristics:

- Instantly drill into millions of 13F securities by type, sector, amount held, and even individual tickers
- Uncover ETF industry trends
- Build custom cohorts of advisors by their holdings
- Monitor securities that advisors are selling

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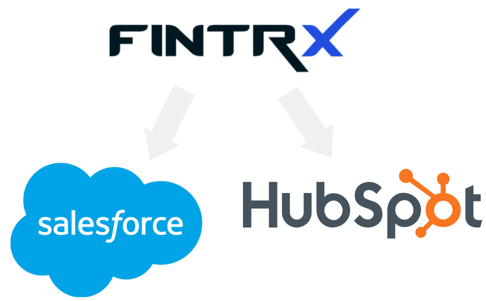
9. Custom Data Feeds & API Integration

At FINTRX, we understand how important it is to build strong, humanized relationships with investors. To facilitate this essential operational need, FINTRX offers full custom CRM integration that allows users to document and track all interactions with the family offices and contacts that live within our proprietary dataset. Choose from multiple methods of delivery and formats, including Salesforce and HubSpot options.

Key Characteristics:

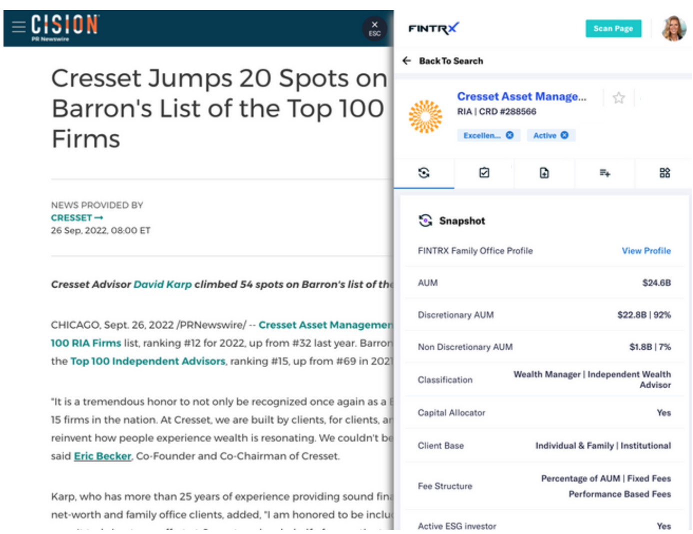
- Migrate family office, RIA, and contact data & lists to optimize your pipeline
- Build custom file delivery options to power your data needs
- Single-click data importing directly to your CRM
- Utilize customized data feeds to streamline your workflow



[Integrate FINTRX Data Within Your Systems]

10. Google Chrome Extension Plugin

Access FINTRX family office & RIA data directly within your browser. Search and scan any news article or webpage to uncover valuable data - such as key decision makers, recent allocations, M&A activity, new launches, and private investments. With a single click, pull in personalized data to drive better conversations and expand your network. Our Chrome Extension will even alert you to any recent news mentions on your prospects.



'True-sync' technology allows you to add firms and contacts of interest to your lists, create notes & tasks, and mark your favorites, all updated instantly within the FINTRX app.

Key Characteristics:

- Instantly connect FINTRX & LinkedIn contact data
- Updated emails & phone numbers at your fingertips at all times
- Extract & research family offices & RIAs from news articles

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