FINTRX

2024

A Deep Dive into the FINTRX Family Office Dataset

23,000+
Family Office Contacts

4,000+
Family Offices

27,500+
Tracked Investments

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Introduction

The family office landscape is dynamically evolving, presenting unique opportunities and challenges for investment professionals in this influential sector of the private wealth ecosystem. This report draws on FINTRX's extensive database of 4,000+ family offices to provide a detailed analysis of the global family office market. As the premier provider of private wealth data intelligence, FINTRX is uniquely equipped to offer unparalleled insights into this complex arena.

Through a data-driven analysis, we uncover key insights from asset allocation preferences and investment strategies to the factors influencing family office formation and growth. Whether you're an established wealth manager, a rising alternative investment firm, or an ambitious fintech disruptor, understanding the nuances of the family office market is crucial for unlocking new avenues for growth.

Global Family Office Coverage

FINTRX offers unparalleled coverage of the global family office landscape, providing access to data on over 4,000 single and multi-family offices. Our proprietary database includes detailed profiles of these family offices, with information on their total assets under management, investment preferences and so much more. With 23,000 family office decision-makers, FINTRX empowers financial professionals to effectively identify, target and engage with the right family office prospects to drive meaningful business outcomes.
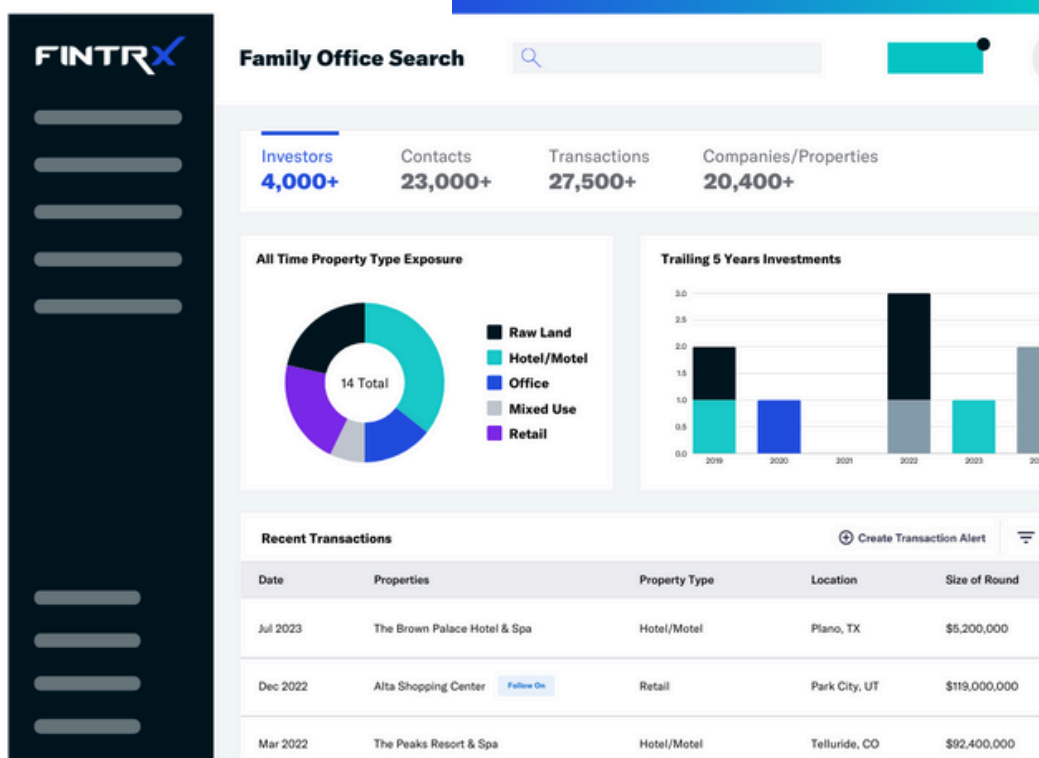
4,000+
Total Family Offices

23,000+
Family Office Contacts

1,870+
Single Family Offices
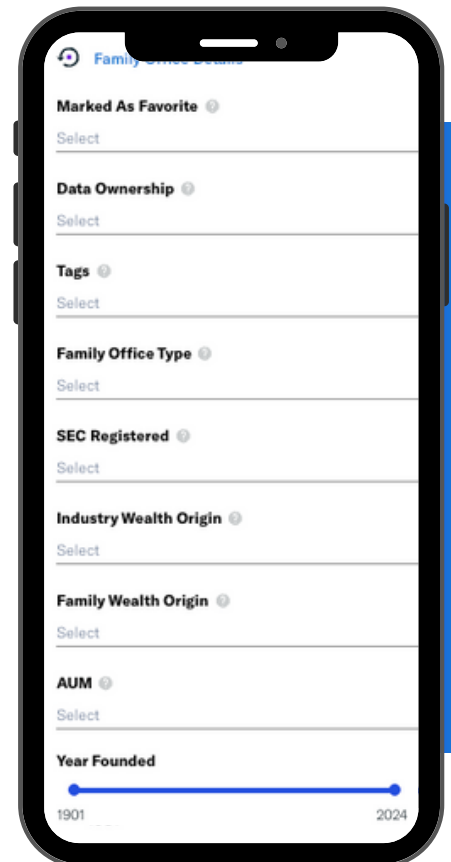
2,130+
Multi-Family Offices

Year Founded

A closer examination of the family office data within the FINTRX platform reveals that a majority of family offices (31%) were founded in the early 2000s. This underscores the significant evolution of the family office space over the past two decades, as wealthy families increasingly sought to centralize the management of their financial affairs and legacy planning. The growth was likely fueled by the rise in entrepreneurial wealth, increasingly complex investment and tax environments and a desire for more control over wealth management.

Year Founded	Percentage
Prior to 1980	5%
1981 - 2000	22%
2001 - 2010	31%
2011 - 2015	20%
2016 - 2024	16%
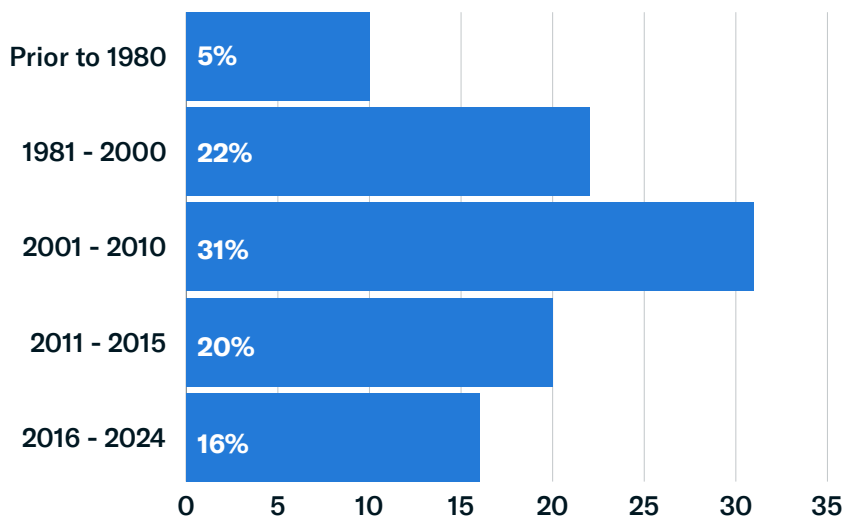
Number of Family Offices Founded from 2001 - 2010

1,230+

Asset Class Interest

FINTRX data on family office investment preferences demonstrates their varied allocation strategies, with most firms favoring private equity (78%) and direct investments (71%). Real estate (60%), long-only funds (49%), and hedge funds (47%) also attract significant family office capital. Venture capital, fund of funds, and debt strategies account for less than 40% each, showcasing the strategic and multi-faceted approach family offices take to portfolio construction.

Asset Class	%
Private Equity	78%
Direct Investments	71%
Real Estate	60%
Long Only	49%
Hedge Funds	47%
Venture Capital	38%
Fund of Funds	23%
Debt	20%
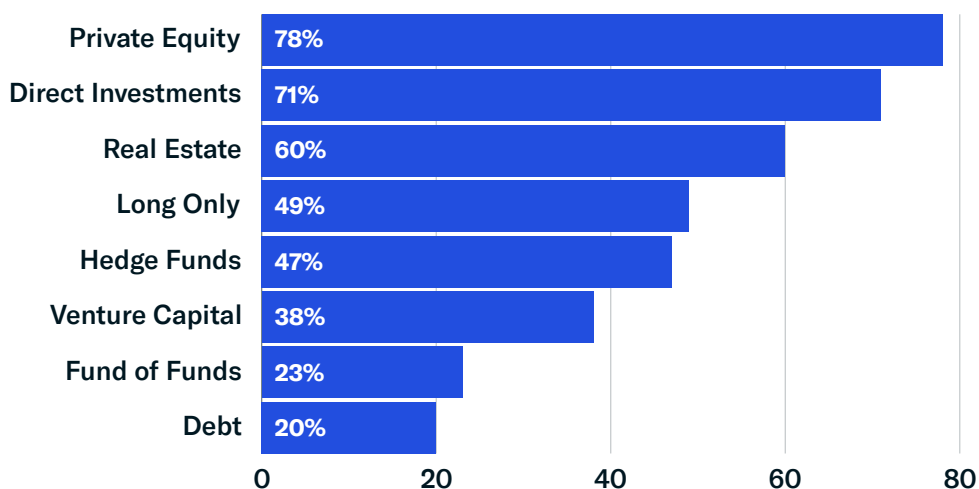
Whether you're targeting family offices active in real estate, private equity or other asset classes, our intuitive filters help you precisely identify the most relevant prospects. By gaining insights into asset class preferences from the start, asset managers can develop personalized outreach strategies that truly resonate, enhancing the chances of successful engagement.

Family Offices Active in Private Equity

3.2K+

**Family Offices Active in Direct Investments**

3K+

Family Offices Active in Real Estate

2.5K+

Assets Under Management (AUM)

Whether you're seeking to connect with emerging family offices managing under $100 million or established ultra-high-net-worth families overseeing billions, the FINTRX AUM filter provides the granular control needed to build a pipeline of well-suited opportunities.

AUM Range	Percentage
$50M - $100M	13%
$100M - $400M	20%
$400M - $1B	19%
$1B - $2B	15%
$2B - $5B	17%
$5B+	16%
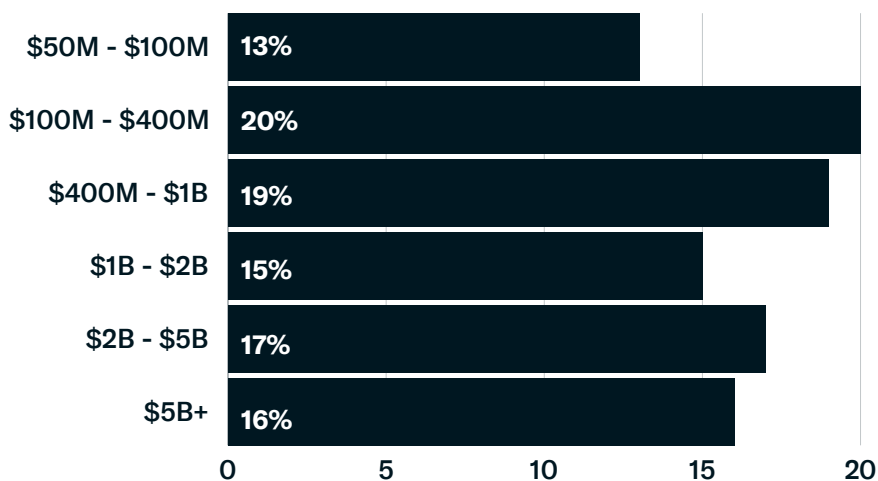
FINTRX data reveals that most family offices manage client assets ranging from $100 million to $400 million, with a significant number also handling assets between $400 million and $1 billion.

This middle-market sweet spot underscores the growth and professionalization of the family office industry in recent decades, as wealthy families have increasingly sought to centralize the management of their financial affairs. Firms in this AUM range often exhibit sophisticated investment capabilities, institutional-grade infrastructure and a proven track record of multi-generational wealth preservation.

Origin of Wealth

Understanding the origin of wealth is crucial for asset managers, as it provides insights into the financial behaviors, risk tolerance, and investment preferences of potential clients. By leveraging FINTRX's wealth origin filter, asset-raising professionals can tailor their outreach and offerings to best align with a firm's specific investment DNA, ultimately enhancing their chances of securing meaningful capital allocations.
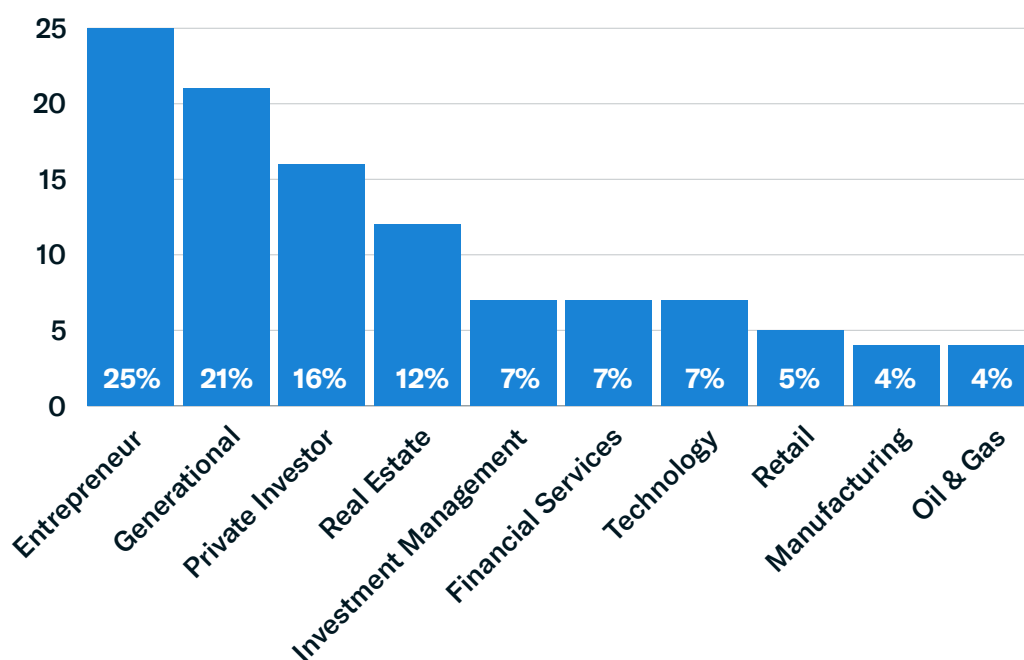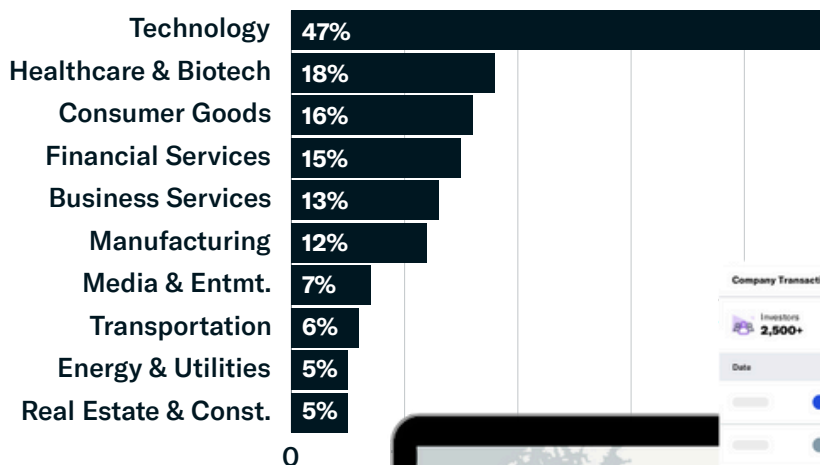

FINTRX data reveals a fascinating trend - a majority of family office entities made their fortunes as entrepreneurs, through generational wealth transfers, or as private investors. This underscores the diverse backgrounds and investment mindsets within the family office ecosystem. Entrepreneurs tend to have a growth-oriented, risk-tolerant approach, while families with generational wealth often focus more on capital preservation and legacy planning. Private investor-backed family offices typically exhibit sophisticated, institutional-grade investment processes.

Direct Investments | Private Companies

FINTRX provides comprehensive coverage of family office investment activity through two key data points - direct company transactions and direct property transactions. Our 75+ person research team meticulously tracks the investments made directly by family offices, capturing details such as the industry, size and location of the target companies and properties. This data helps users match investment profiles with their fund strategies and provides insights into emerging sectors and geographic trends.

Company Investments: Top 10 Sectors

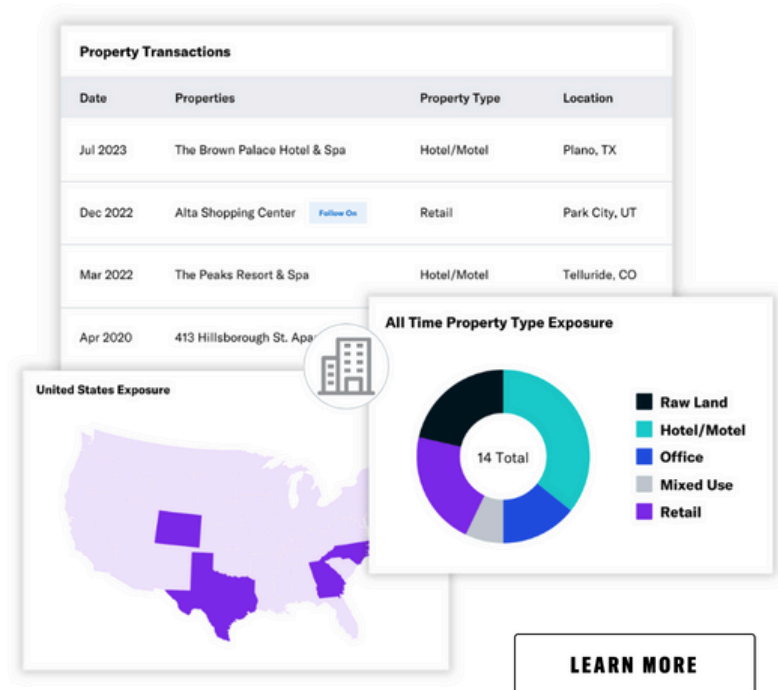| Sector	Percentage
Technology	47%
Healthcare & Biotech	18%
Consumer Goods	16%
Financial Services	15%
Business Services	13%
Manufacturing	12%
Media & Entmt.	7%
Transportation	6%
Energy & Utilities	5%
Real Estate & Const.	5%

42K+ Total Tracked Investments

51% of family offices actively engage in direct investments, with the majority of those investments (47%) being made into companies within the technology sector.
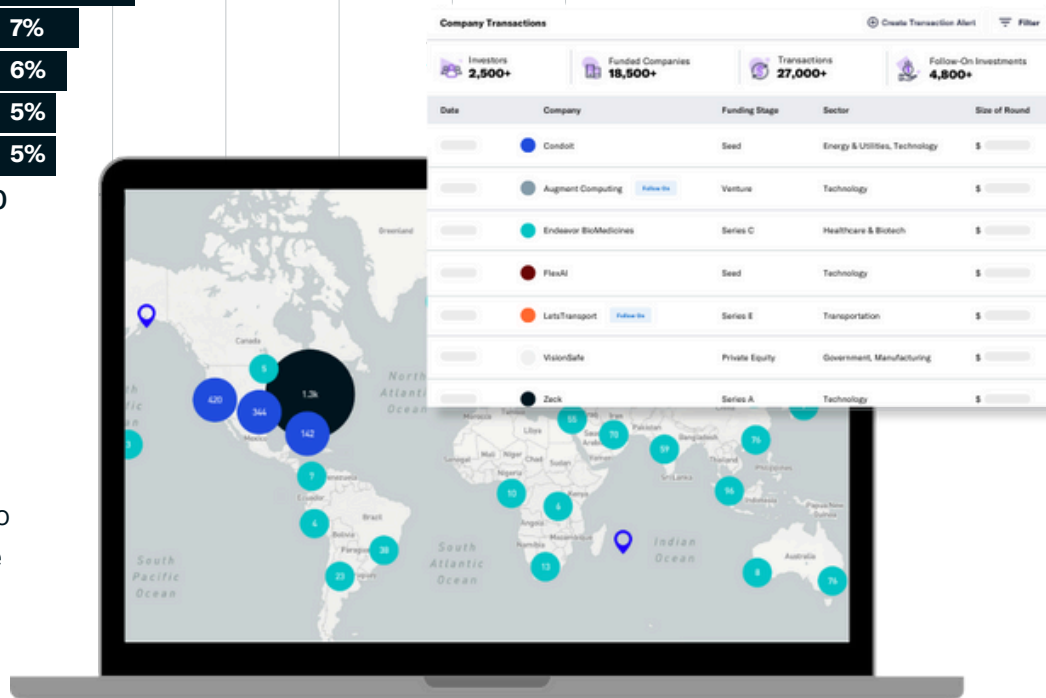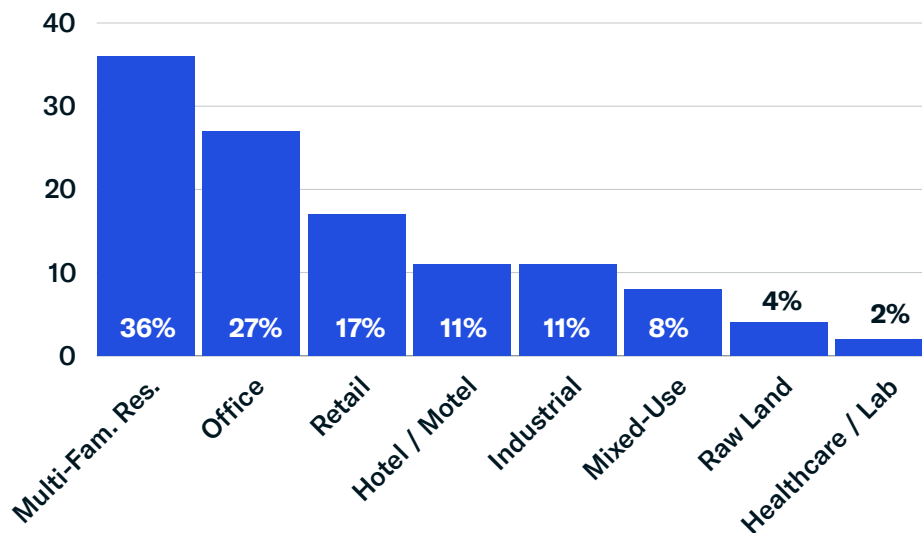
Direct Investments | Real Estate Properties

Family offices exhibit diverse investment preferences in direct property transactions, with 36% favoring multi-family residential properties as their top choice. Office spaces also draw significant interest, attracting 27% of family office investments, followed by retail spaces, which engage 17%.

2.5K+ Total Tracked Investments

Property Transactions

Date	Properties	Property Type	Location
Jul 2023	The Brown Palace Hotel & Spa	Hotel/Motel	Plano, TX
Dec 2022	Alta Shopping Center Follow On	Retail	Park City, UT
Mar 2022	The Peaks Resort & Spa	Hotel/Motel	Telluride, CO
Apr 2020	413 Hillsborough St. Apa		

United States Exposure

All Time Property Type Exposure

14 Total

- Raw Land
- Hotel/Motel
- Office
- Mixed Use
- Retail

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Direct Property Transactions by Type

Multi-Fam. Res.	36%
Office	27%
Retail	17%
Hotel / Motel	11%
Industrial	11%
Mixed-Use	8%
Raw Land	4%
Healthcare / Lab	2%

This data is essential for real estate professionals seeking to engage family office investors and align their offerings with the asset classes most attractive to family office capital.

Geographical Breakdown

FINTRX data reveals a distinct geographical footprint for family offices globally, with the majority (56%) headquartered in North America, followed by a substantial presence in Europe (29%). This underscores the sophisticated financial infrastructures that cater to the wealth management needs of affluent families in these regions. Asia, accounting for 7%, indicates a growing family office presence, while the Middle East, Latin America/Caribbean, Oceania and Africa maintain smaller shares at a combined 8%.

North America
56%

Europe
29%

Asia
7%

Rest of World
8%

This geographic spread highlights North America and Europe as major centers for wealthy families seeking advanced wealth management services and shows the increasing appeal of family offices in other regions as global economic development and high-net-worth populations grow.

About FINTRX

FINTRX is a unified family office and RIA database that provides comprehensive data intelligence on 850,000+ family office and investment advisor records, ultimately designed to help asset-raising professionals identify, access and map the global private wealth ecosystem. Our platform combines data, analytics and intuitive software to help clients identify investment opportunities, connect with investors and stay informed on industry developments.

FINTRX is designed to be user-friendly, with a variety of features including custom list building, news alerts and notifications, real-time updates and customizable reporting options. Additionally, new AI-powered features such as natural language search capabilities and advanced relationship intelligence empower users to leverage the most accurate and relevant family office and investment advisor data to prospect more efficiently, book more meetings and close more deals.

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