



**August 2023**

**Family Office & Registered Investment Advisor  
Data Report**

MONTHLY PRIVATE WEALTH DATA REPORT



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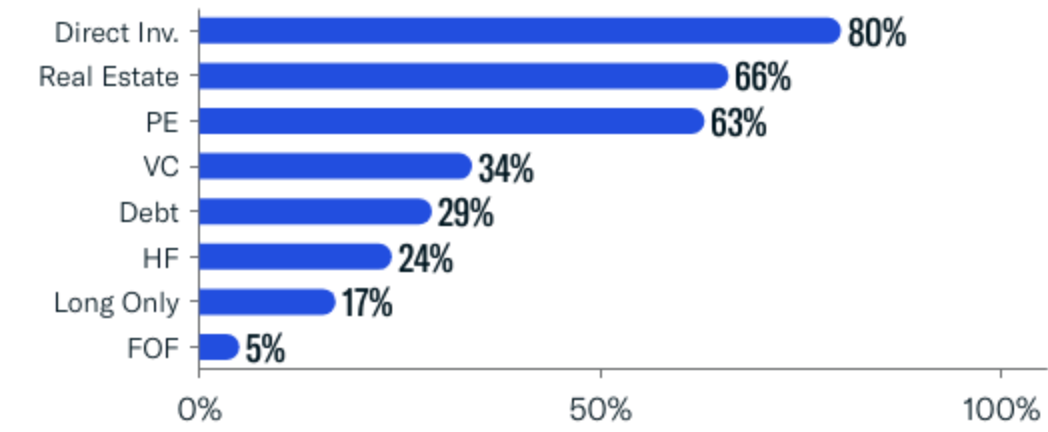
# Family Office Data Report: August 2023

All data was compiled using the [FINTRX Family Office Data Platform](#)

## Family Office Platform Updates & Additions

- New Family Offices: 41
- New Family Office Contacts: 265
- Total Family Office Additions: 720+
- Updated Family Office Entities: 3,380+
- Newly Tracked Family Office Investments: 415
- New Family Office Data Points: 3,140+
- Total AUM Added by New Firms: \$47.7 Billion

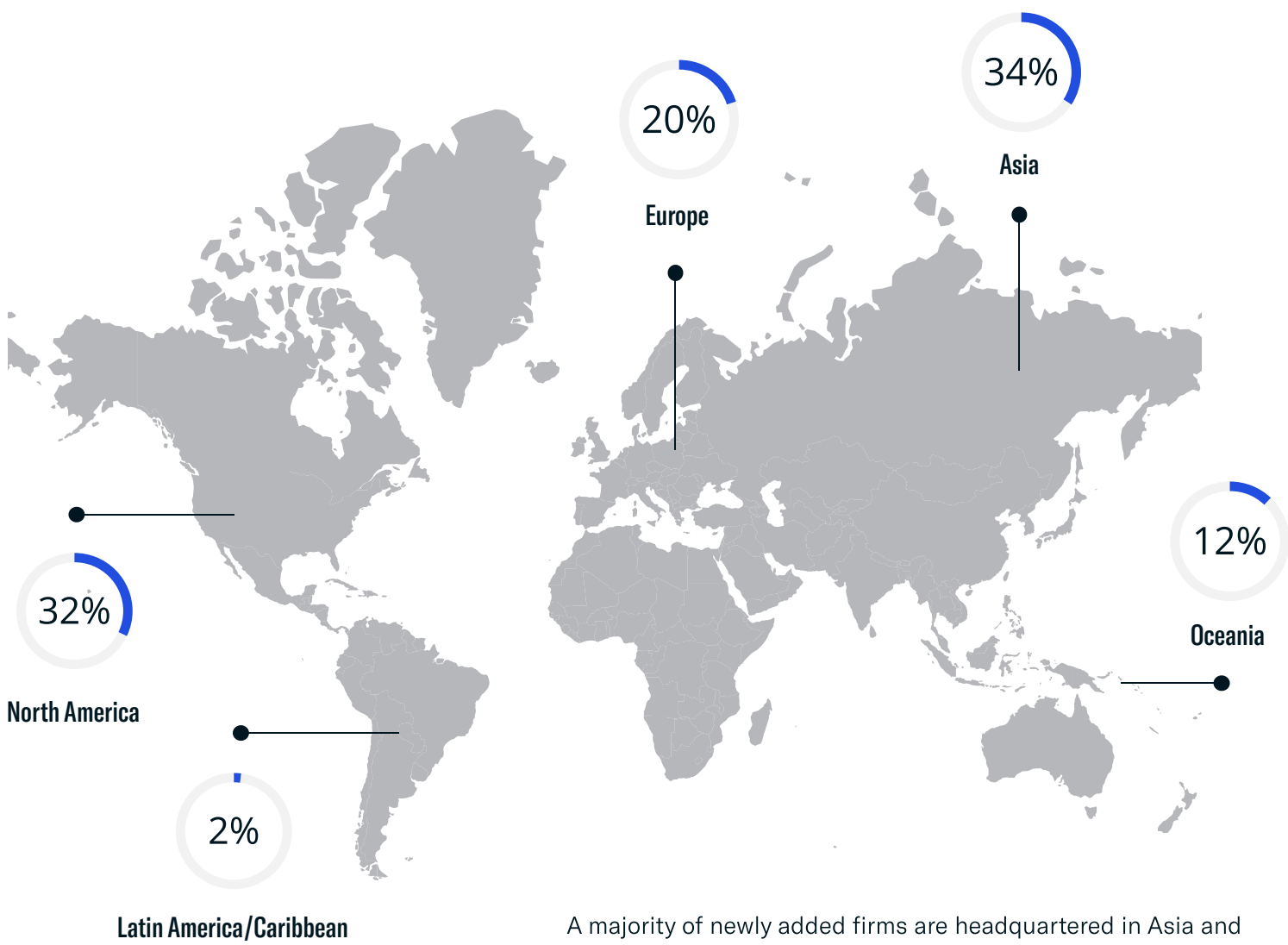
## Asset Class Interest Breakdown



When it comes to the asset class interest of newly added family offices, FINTRX saw a majority of firms allocating via direct investments into private companies, as well as to real estate and private equity.

## Family Office Geographical Breakdown

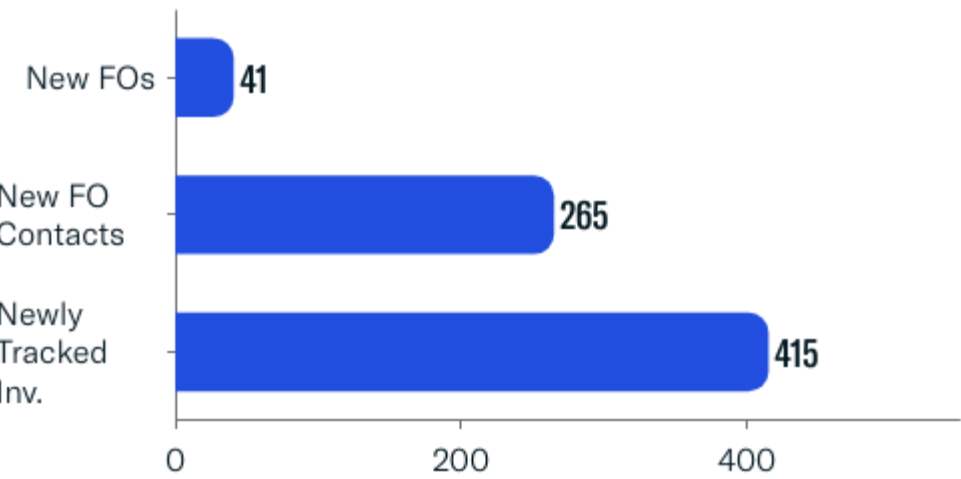
Regions with New Family Office Activity



A majority of newly added firms are headquartered in Asia and North America, accounting for 34% and 32%, respectively. This highlights the emerging dominance of Asia as a leading hub region for startup activity and innovation.

## Family Office Platform Additions

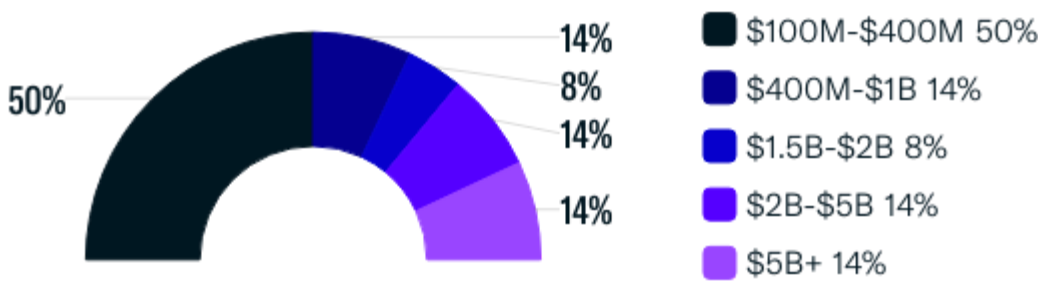
Newly Added Family Offices, Family Office Contacts & Tracked Investments



## Assets Under Management (AUM)

Newly Added Family Offices that Disclosed their AUM

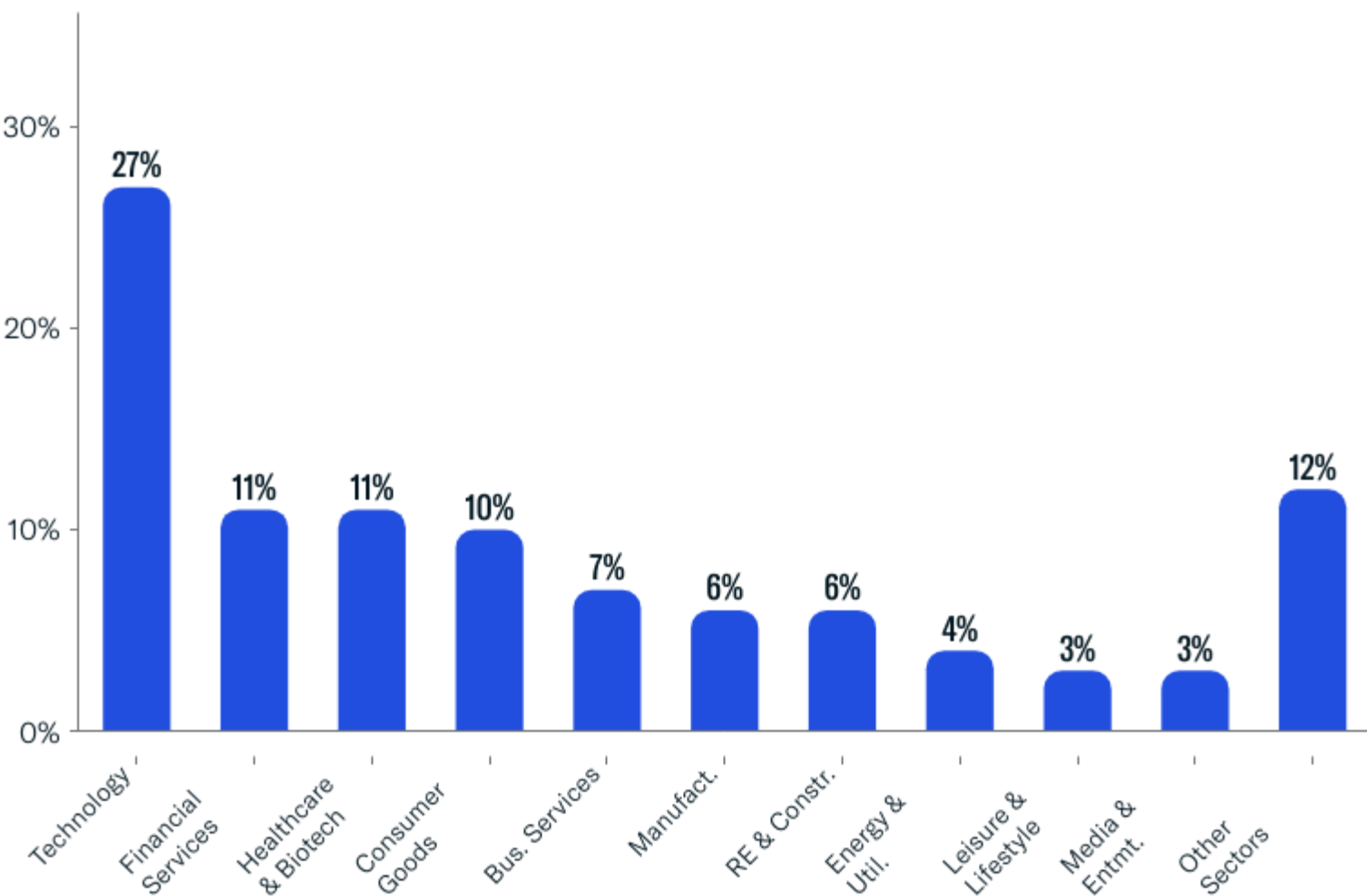
A majority (50%) of newly added firms (that disclosed their AUM) have assets between \$100M and \$400M.



## Newly Tracked Family Office Investments: Top 10 Sectors of Interest

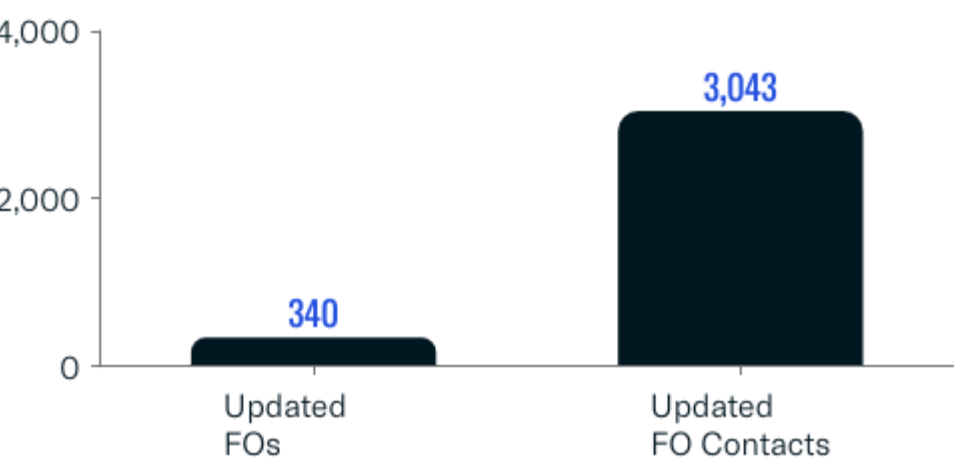
A significant portion of newly added family offices showed direct investment activity in the technology sector with over 100+ investments made. Other sectors of interest included financial services, healthcare & biotechnology, consumer goods and business services.

415 Newly Tracked Family Office Investments

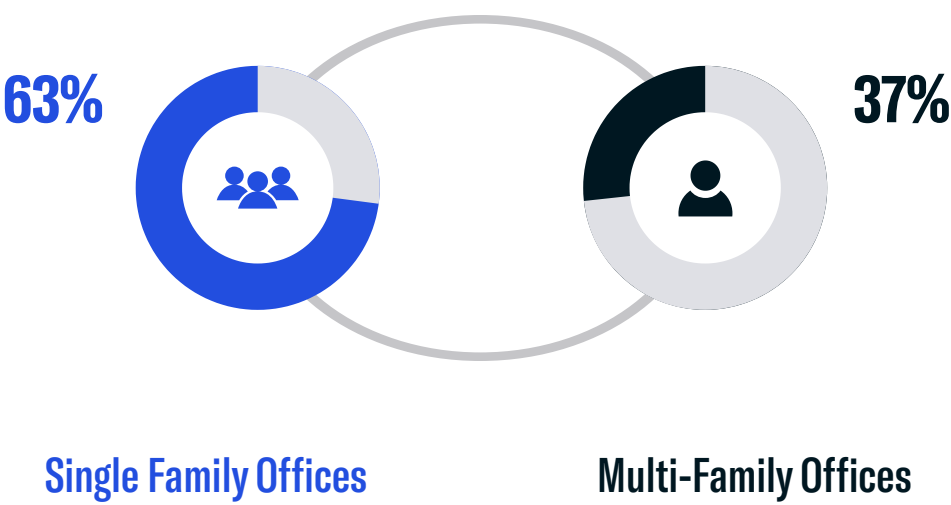


## Updated Family Office Entities

Updated Family Offices & Family Office Contacts



## Single Family Offices vs Multi-Family Offices



# Registered Investment Advisor (RIA) Data Report: August 2023



All data was compiled using the [FINTRX Registered Investment Advisor \(RIA\) Data Platform](#)

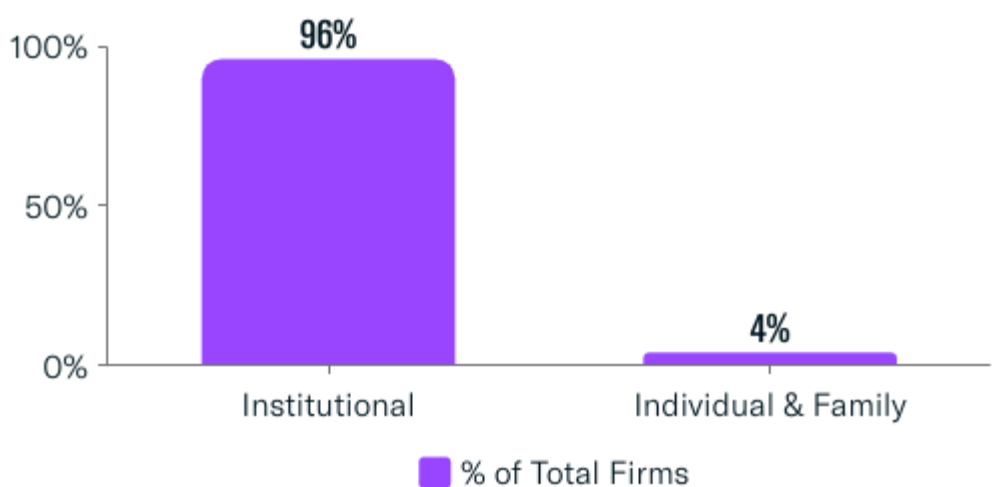
## RIA Data Highlights

New Platform Additions for August

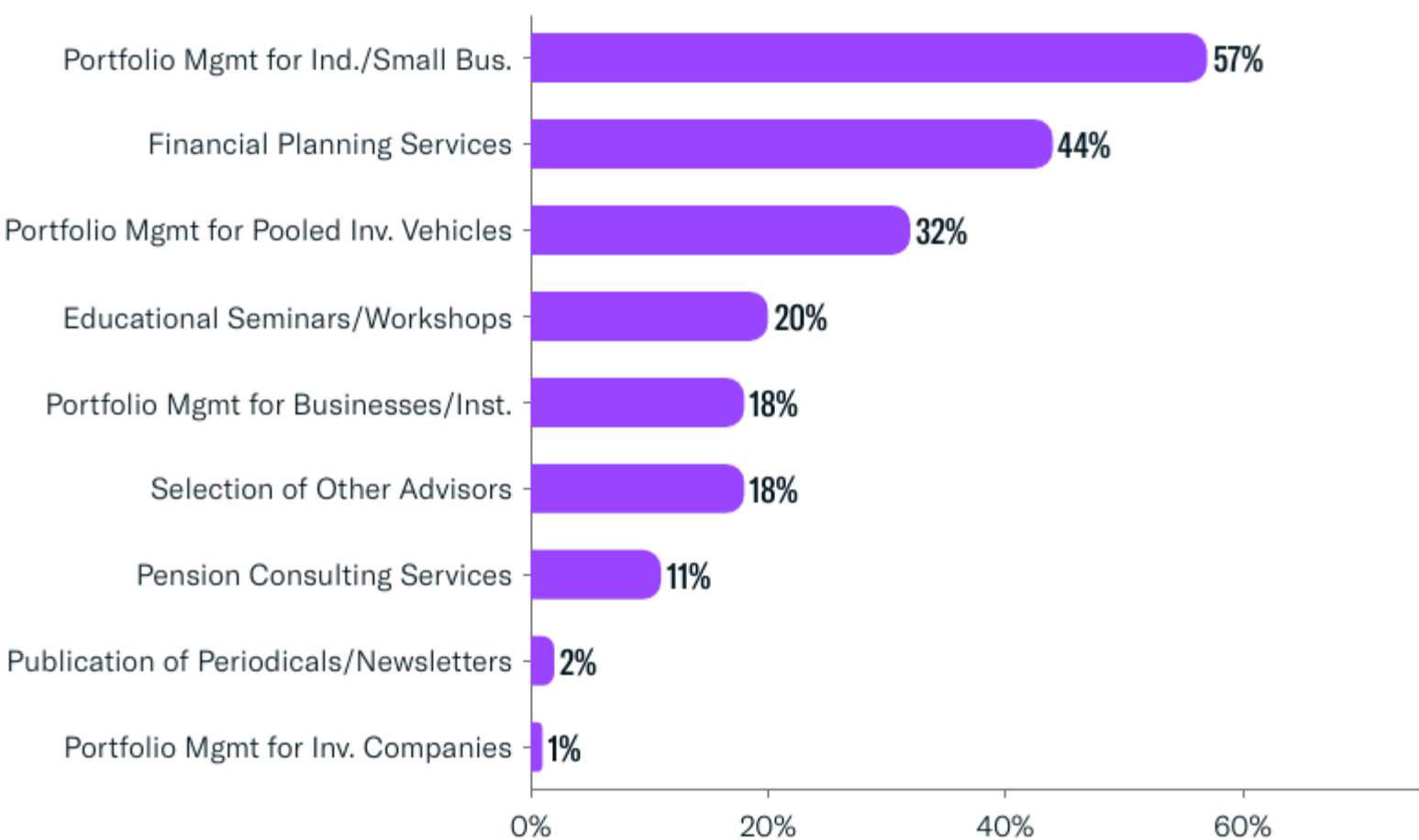
- Total Registered Entities (including Dually Registered): **185**
- Total Registered Contacts: **6,260+**
- Total Accounts: **810+**
- Firms Using Alternatives: **141 or 76%**
- Total AUM Added by New RIA Firms: **\$35.5 Billion**

## RIA Client Base Breakdown

The newly added RIA firms added to FINTRX in August reveal that **96%** of their RIA clientele are institutional, while individual and family clients account for just **4%**.



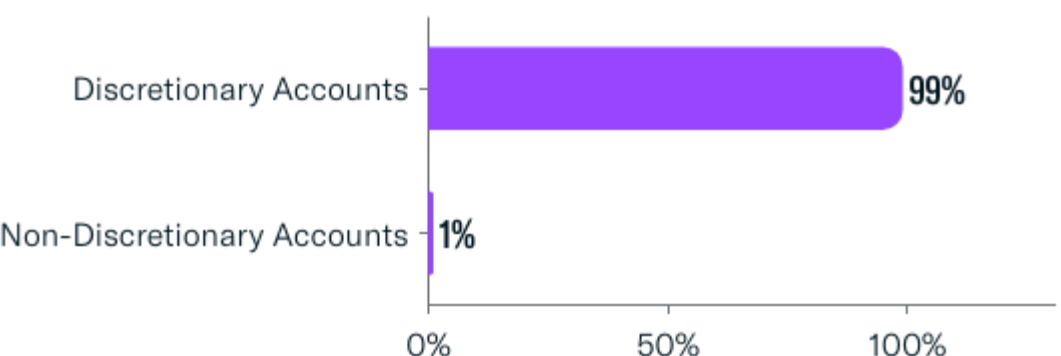
## RIA Services Provided



Of the new RIA firms incorporated into the FINTRX dataset, **57%** offer portfolio management for individuals and small businesses, while **44%** provide financial planning services. It's important to note, RIA firms can and often have more than one service offered.

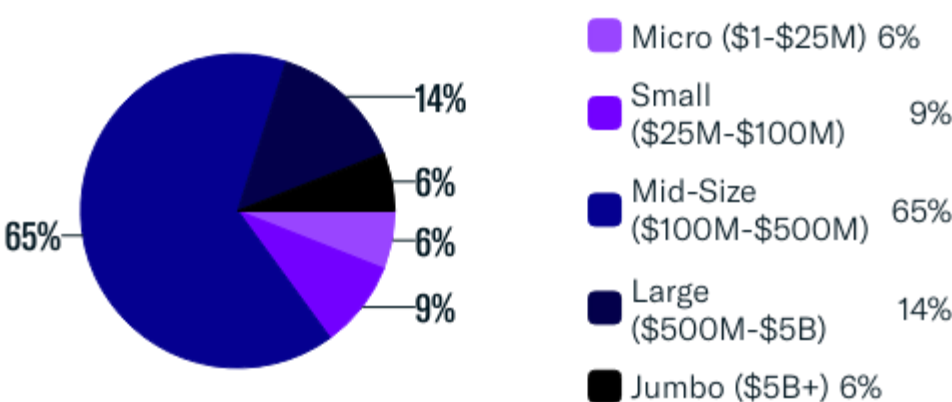
## Accounts Breakdown

Discretionary vs Non-Discretionary Accounts Added



The [FINTRX RIA dataset](#) saw a significant addition of discretionary accounts to our dataset in August, making up **99%** of new accounts added.

## Firm Size by Assets Under Management

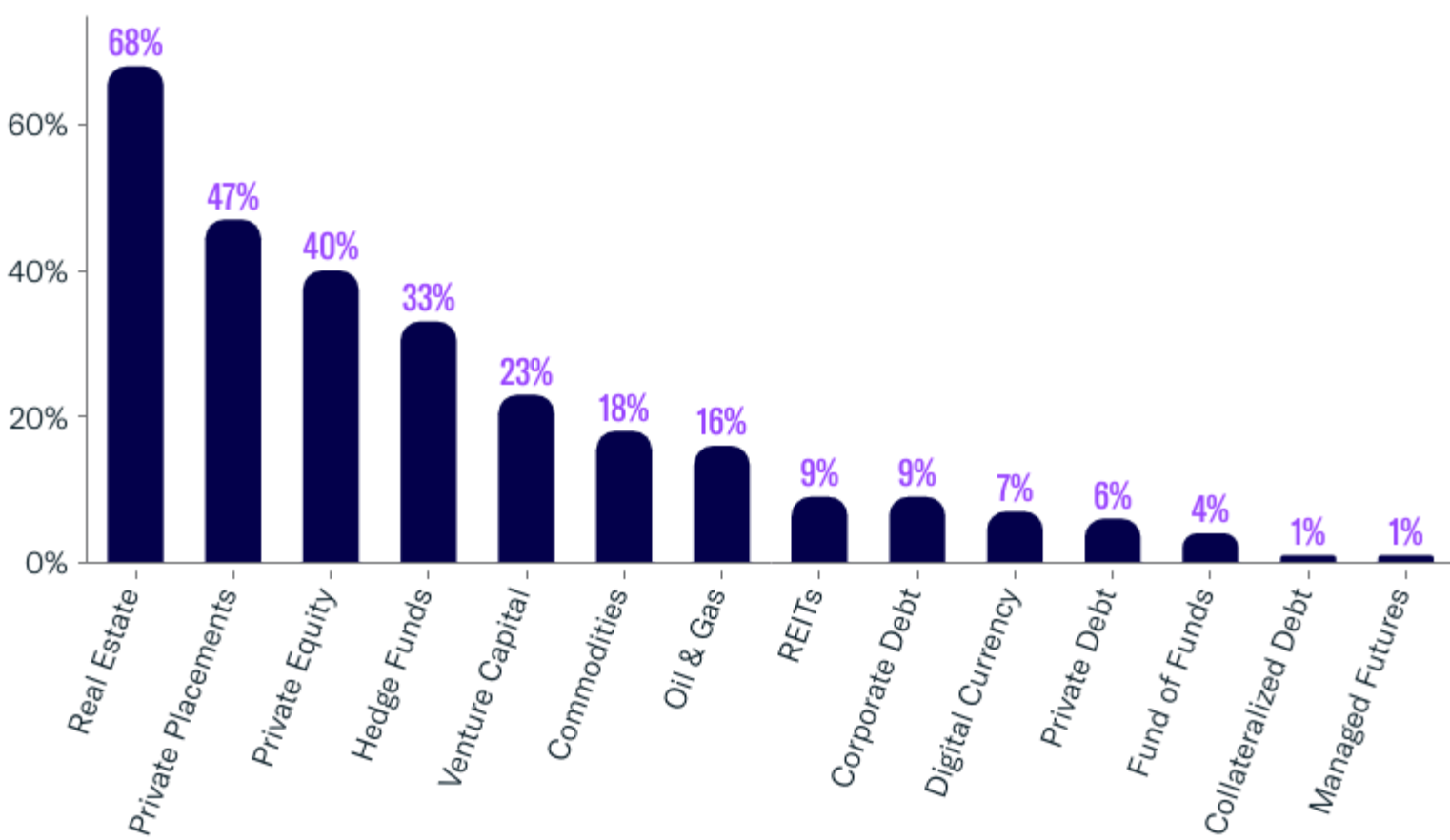


A majority (**65%**) of newly added RIA firms are considered 'Mid-Size' groups, with assets under management between **\$100M** and **\$500M**.

## Alternative Investments Utilized

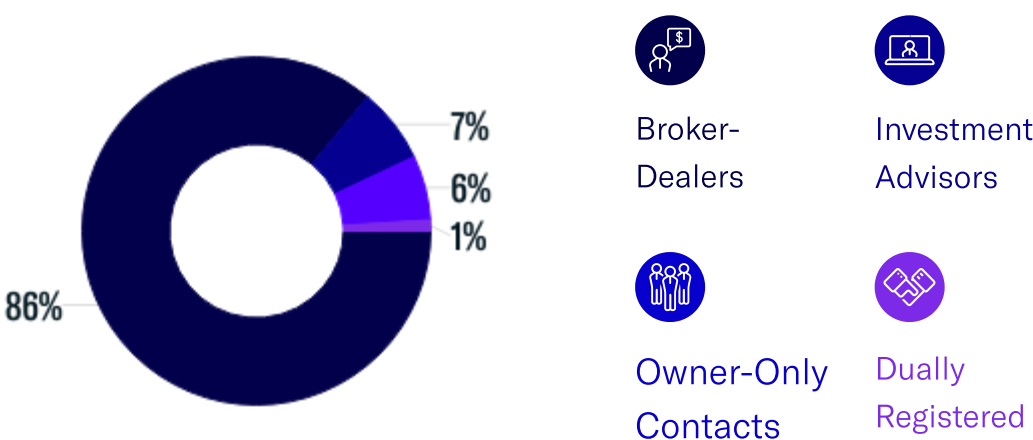
Firm Level

As you can see in the chart below, **74%** of RIA firms displayed some allocation to real estate within their investment portfolios. A smaller fraction displayed interest in hedge funds, private placements and private equity, among a variety of other alternatives.



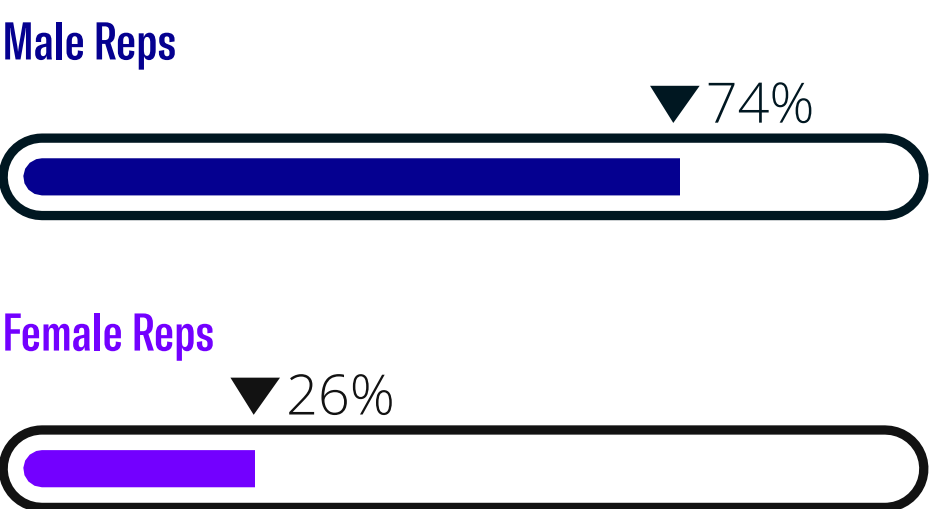
## Contact Breakdown by Rep Type

A majority (**86%**) of newly added RIA representatives are registered as broker-dealers. Smaller segments included those registered as investment advisors at **7%** while owner-only and dually registered contacts each made up a combined **7%**.



## Rep Gender Breakdown

Male vs Female Reps





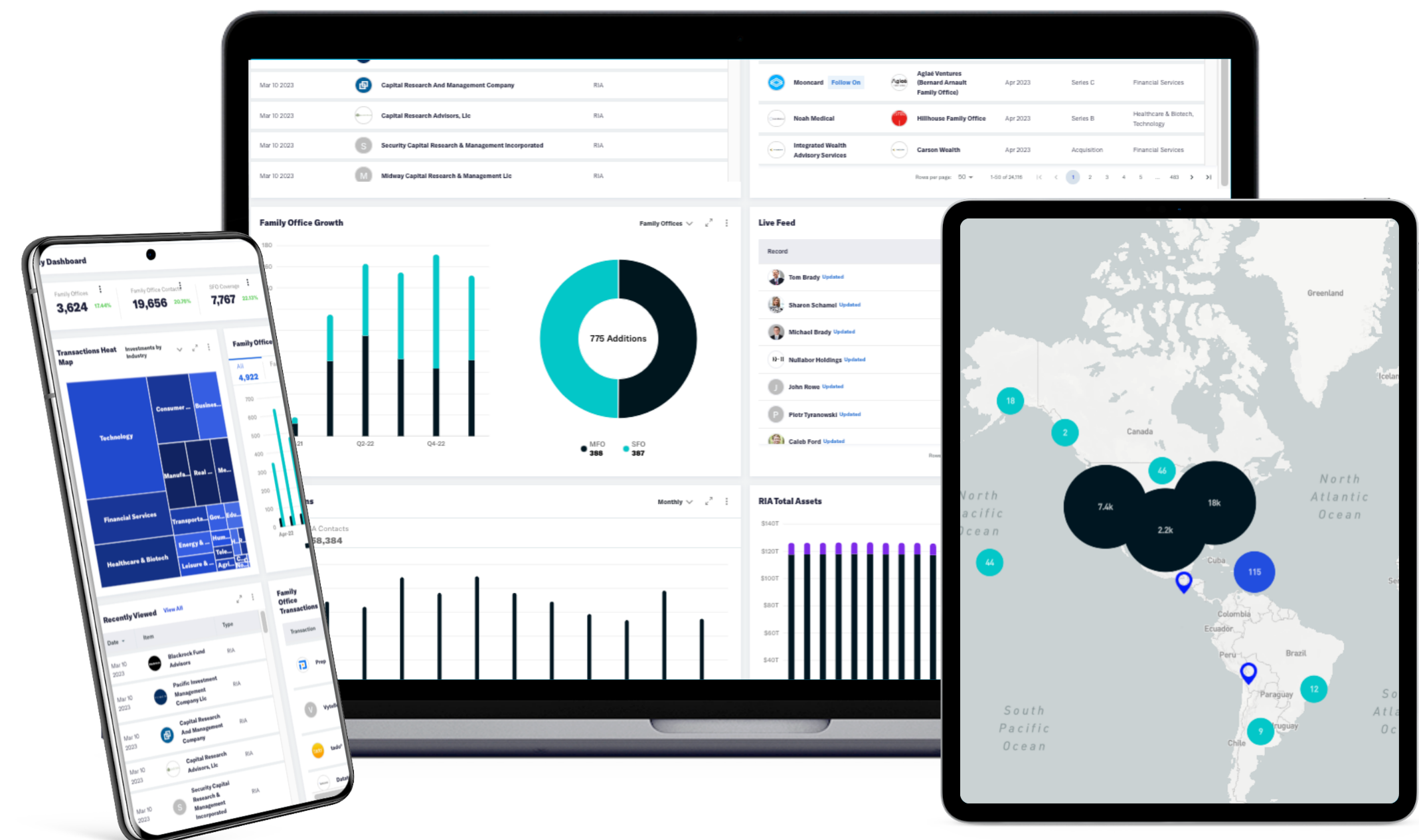
# About FINTRX

**FINTRX** is a unified data & research platform providing comprehensive data intelligence on **850,000+** family office & investment advisor records, each designed to help asset-raising professionals identify, access & map the global private wealth ecosystem.

FINTRX data intelligence covers **3,800+** family offices, nearly **20,000** family office contacts, **40,000+** registered investment advisor entities, and **746,000+** registered reps. Data is sourced from **10+** public & private sources. Equipped with **375+** search filters, FINTRX allows you to [seamlessly track](#) where family office & investment advisor capital is flowing, uncover allocation trends, break down investments by sector & size, understand future investment plans and more.

FINTRX provides in-depth dossiers on each family office & investment advisor, allowing asset-raising professionals to access AUM, source of wealth, investment criteria, past investments made, advisor growth signals, sectors & industries of interest and so much more.

While FINTRX is primarily designed to help asset managers and financial professionals, high-net-worth families, entrepreneurs and next-generation wealth owners can also benefit from our platform in a number of ways. [Streamline investor discovery & boost your capital-raising efforts today!](#)



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