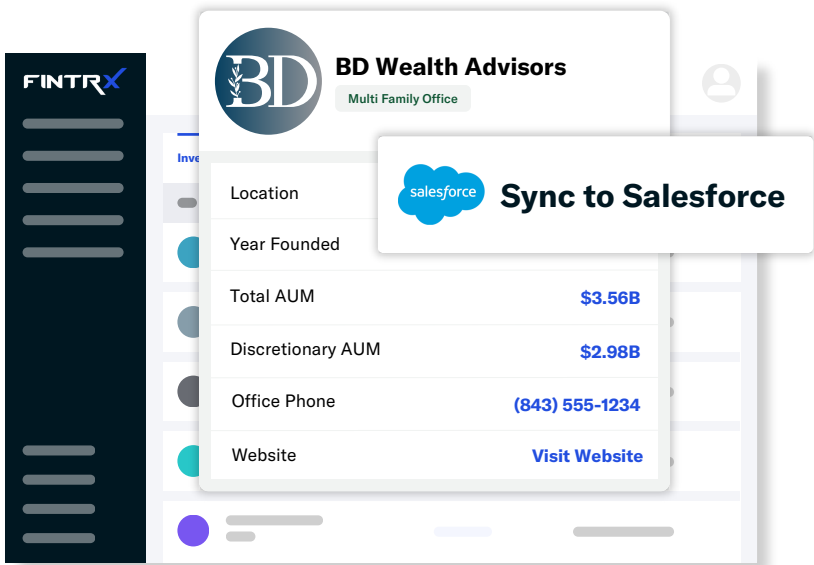


# FINTRX Native CRM Integrations



## Bespoke Wealth Management Data Delivered Directly to Your Systems

Access wealth management & investment data seamlessly within your CRM instances.



Direct CRM Access Within FINTRX Browser Extensions

- Instantly Sync:**
- Lists, firms & contacts
  - Firm & contact news mentions
  - Detailed investment activity
  - Contact passions & interests
- Integrations Include:**
- 200+ firm & contact data fields
  - Customized data syncs and mapping options
  - Real-time data updates within your CRM instance

## Streamline Data Management & Simplify Your Workflow

Leverage FINTRX data to power your campaigns, workflows and prospecting efforts. Maximize efficiency in your daily workflows.

Customize the data you wish to sync or send all 200+ fields with a single click. Control team-wide syncing permissions & data mapping.

Keep track of investment activity, portfolio changes, news mentions, contact information updates, advisor movements and more.