



**February 2024**

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

MONTHLY PRIVATE WEALTH DATA REPORT



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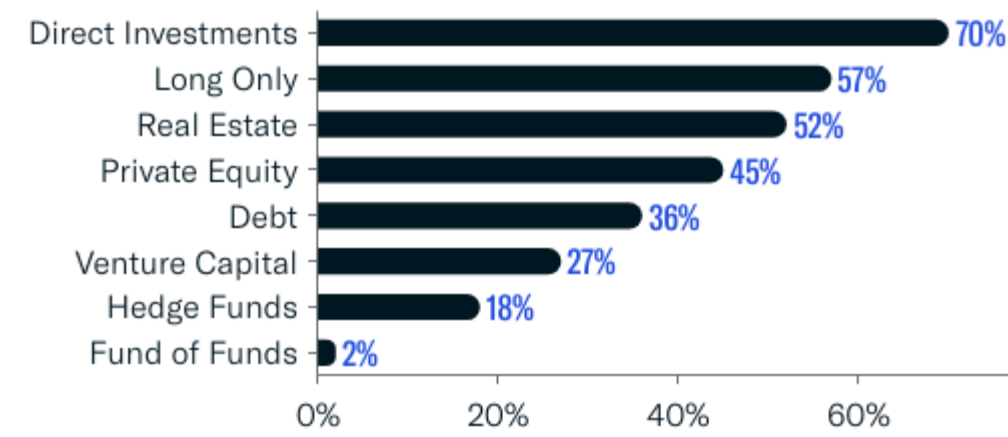
# Family Office Data Report: February 2024

Data: [FINTRX Family Office Database](#)

## Family Office Platform Updates & Additions

- New Family Offices: **40+**
- New Family Office Contacts: **750+**
- Total Family Office Additions: **1,090+**
- Total Updated Family Office Entities: **3,700+**
- Newly Tracked Family Office Investments: **290+**
- New Family Office Data Points: **8,000+**
- Total Family Office Assets Added: **\$35 Billion+**

## Asset Class Interest Breakdown

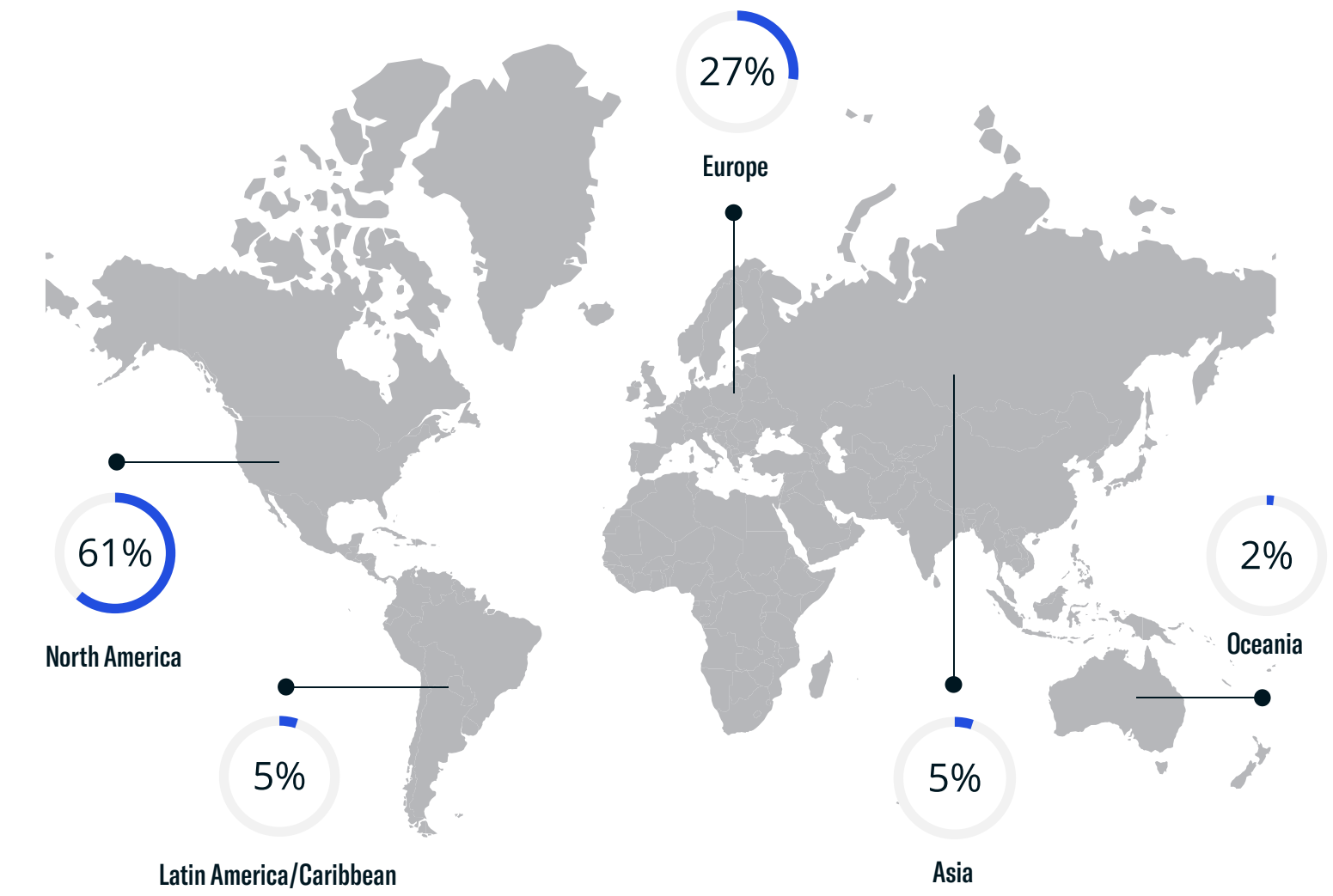


FINTRX continued to see a majority of firms (70%) allocating via direct investments into private companies. Other prominent asset classes include long only equities, real estate and private equity.

## Family Office Geographical Breakdown

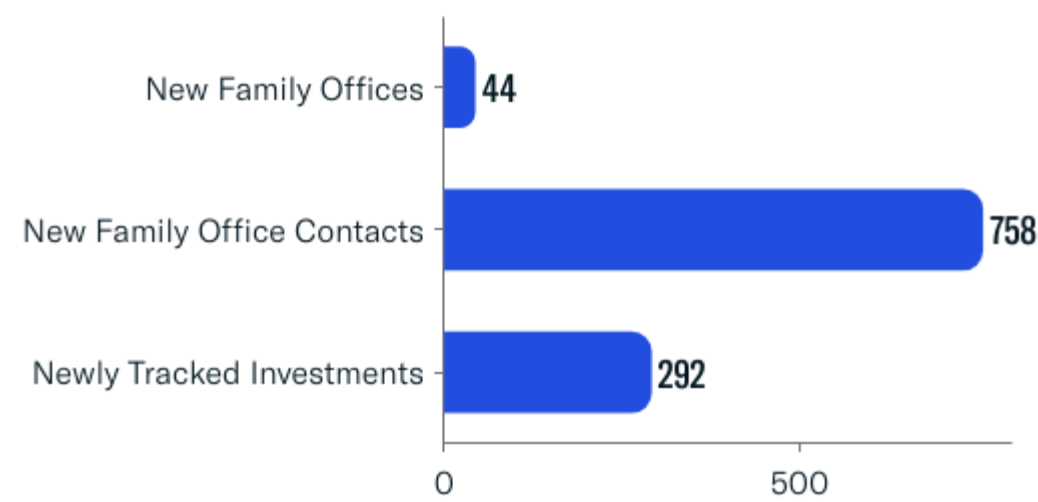
Regions with New Family Office Activity

The vast majority of family offices added to the FINTRX Family Office Dataset in February are headquartered in North America, accounting for 61% of total firms. European offices accounted for roughly 27%, up 5% from last month. Asia and Latin America/Caribbean made up 5% of new offices, respectively, with Oceania making up the remaining 2%.



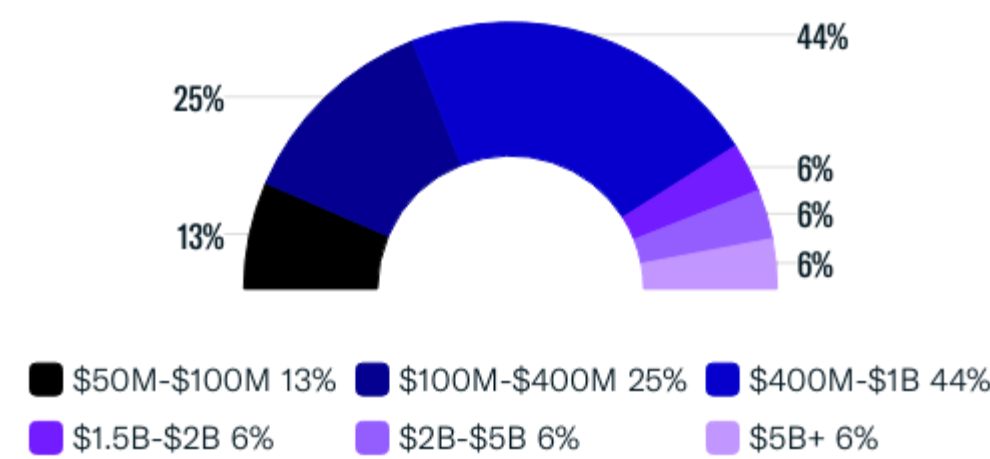
## Family Office Platform Additions

Newly Added Family Offices, Family Office Contacts & Tracked Investments



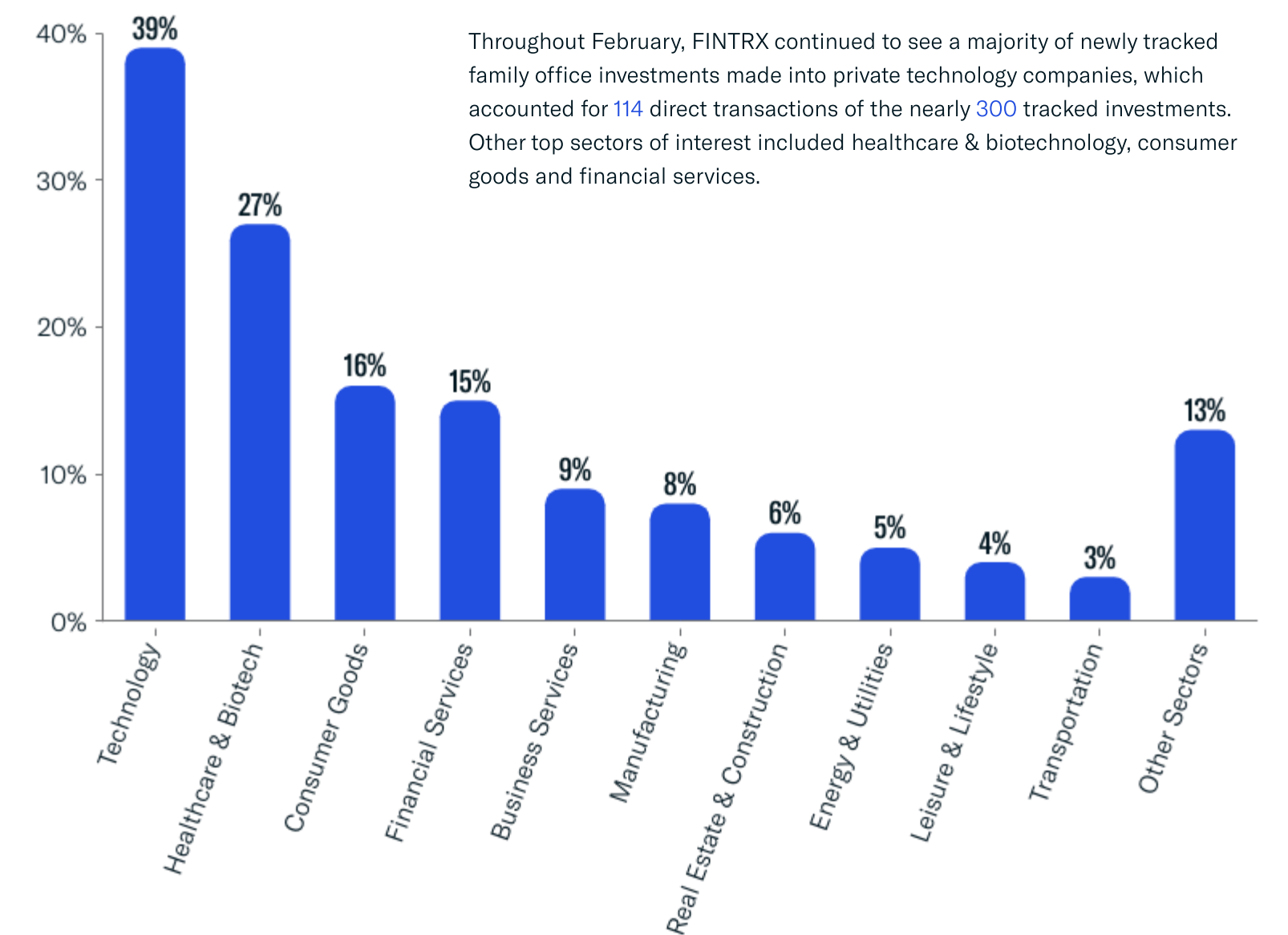
## Assets Under Management (AUM)

Newly Added Family Offices that Disclosed their AUM



## Newly Tracked Family Office Investments

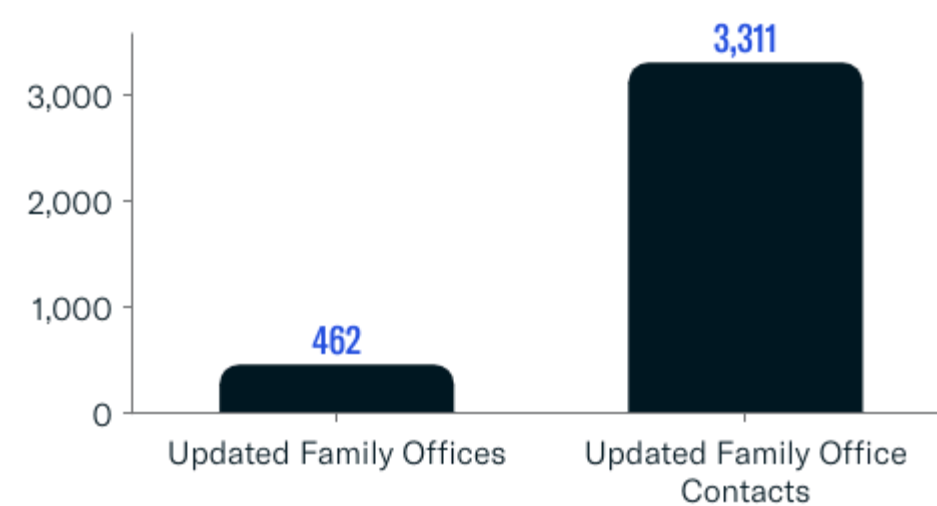
Top 10 Sectors of Interest



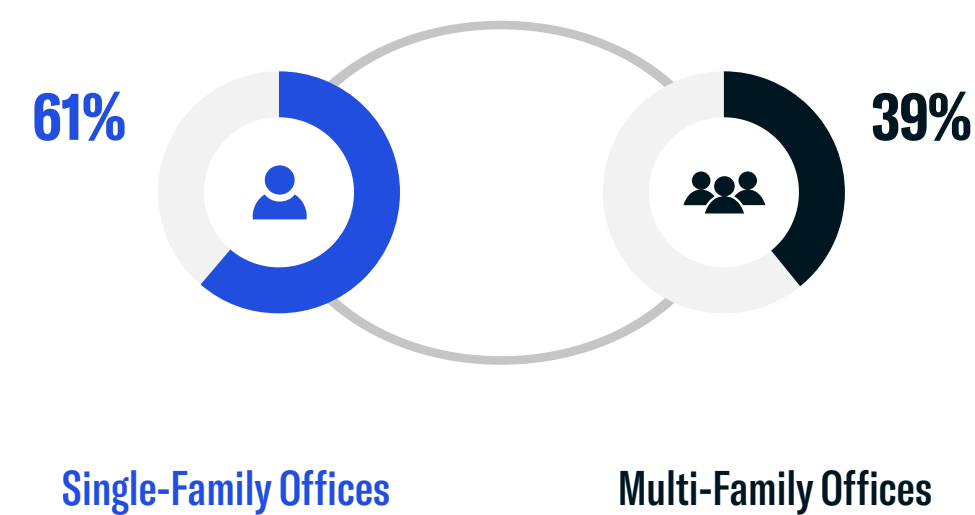
Throughout February, FINTRX continued to see a majority of newly tracked family office investments made into private technology companies, which accounted for 114 direct transactions of the nearly 300 tracked investments. Other top sectors of interest included healthcare & biotechnology, consumer goods and financial services.

## Updated Family Office Entities

Updated Family Offices & Family Office Contacts



## Single-Family Offices vs Multi-Family Offices



# Registered Investment Advisor (RIA) Data Report: February 2024

Data: [FINTRX Registered Investment Advisor \(RIA\) Database](#)

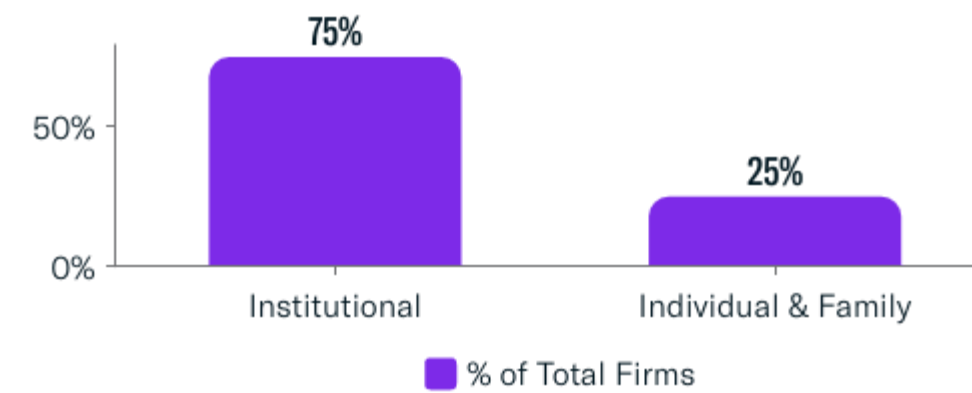
## RIA Data Highlights

New Platform Additions for February

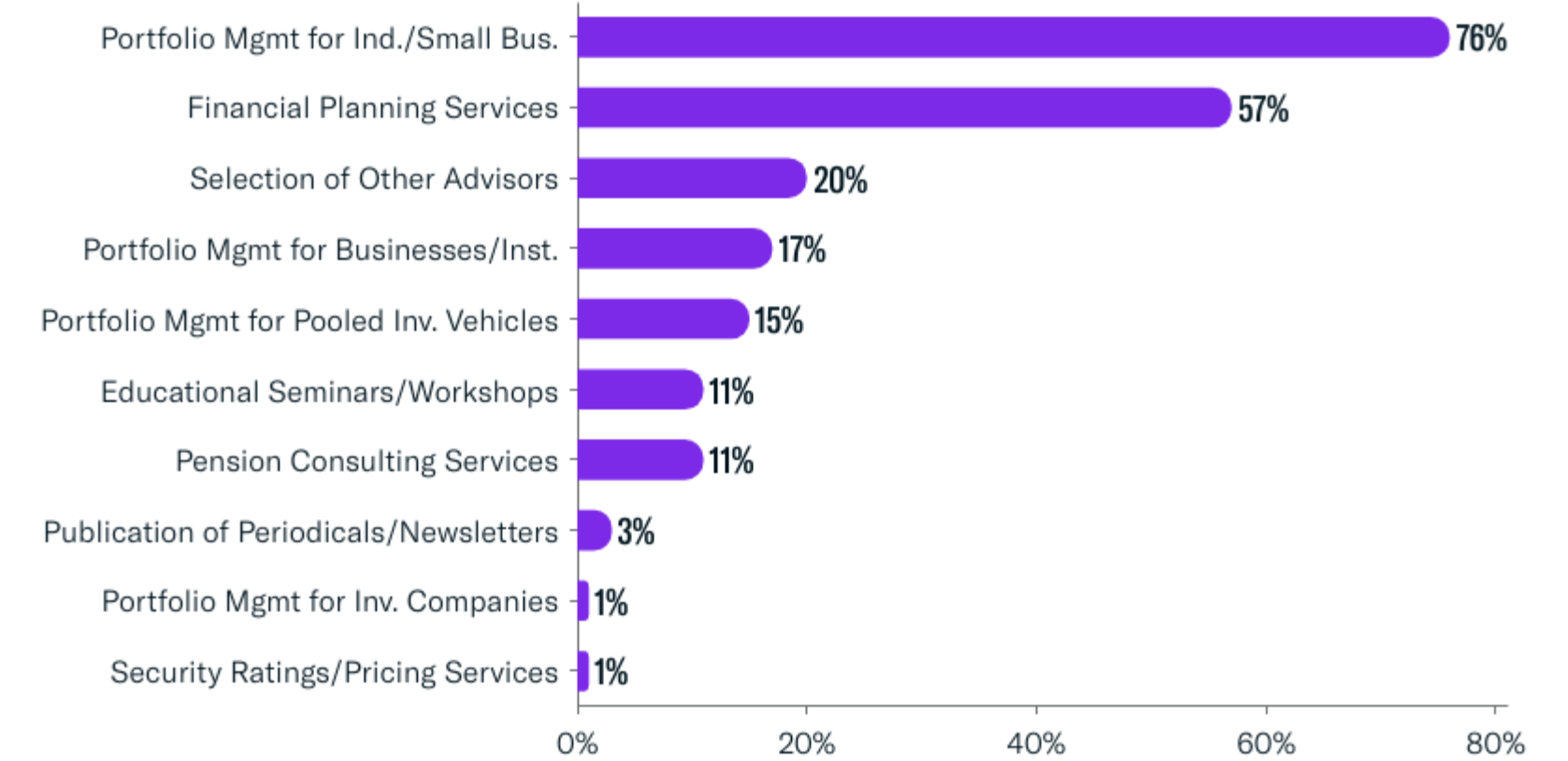
- Total Registered Entities (including Dually Registered): 185
- Total Registered Contacts: 3,450+
- Total Accounts: 270+
- Firms Using Alternatives: 128 or 69%
- Total AUM Added by New Firms: \$10.9 Billion+

## RIA Client Base Breakdown

The February additions to the FINTRX RIA dataset revealed a significant 75% of their client base consists of institutional clients, while individual and family clients make up just 25%. This highlights the strong institutional focus of these RIA firms, showcasing their expertise and dedication in serving this segment of the market.



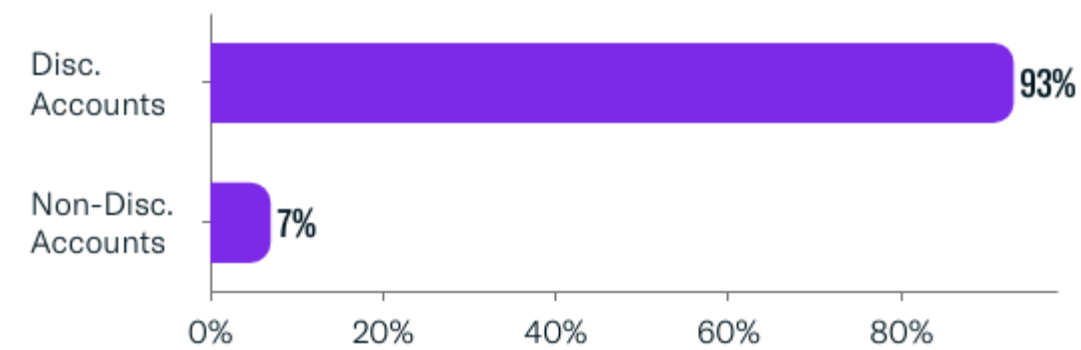
## RIA Services Provided



Portfolio management for individuals and small businesses remains the leading RIA service, at nearly 80%. Financial planning services followed at 57%. Other popular RIA service options include selection of other advisors, portfolio management for businesses and institutions and portfolio management for pooled investment vehicles, all making up 20% or less, respectively. It is important to note that RIA firms typically offer more than one service.

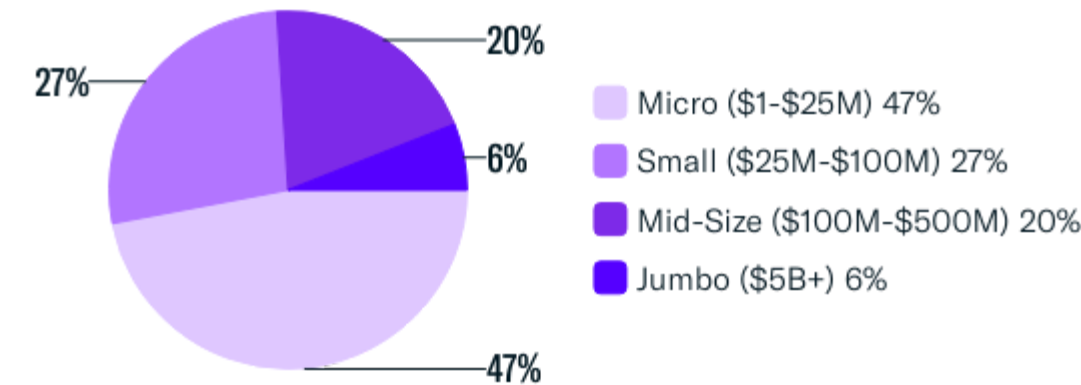
## Accounts Breakdown

Discretionary vs Non-Discretionary Accounts Added



FINTRX RIA data saw a significant addition of discretionary accounts to our dataset in February, making up 93% of new accounts added.

## Firm Size by Assets Under Management

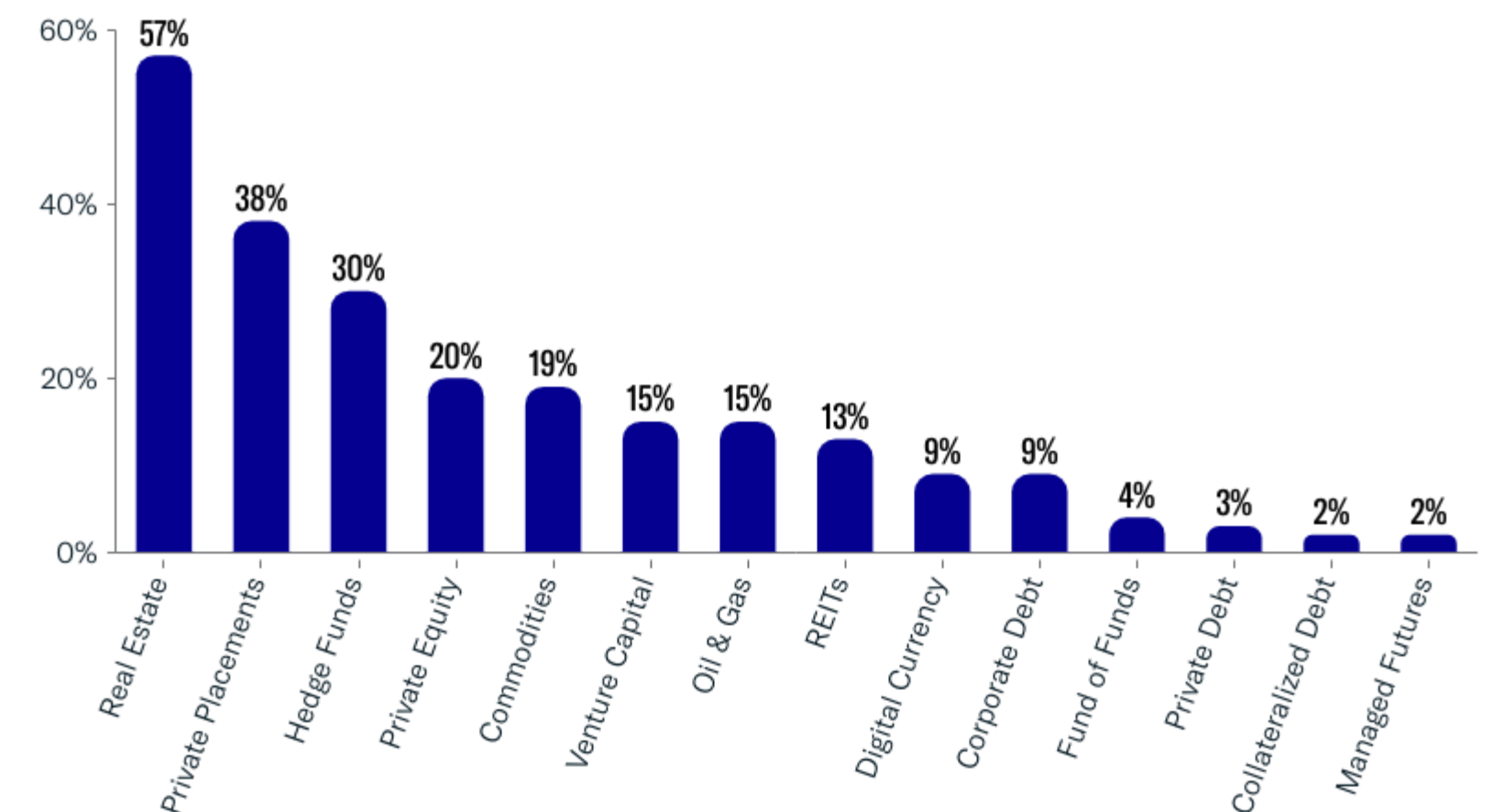


Nearly half (47%) of newly added RIA firms fall under the 'micro' category, managing assets between \$1 and \$25 million.

## Alternative Investments Utilized

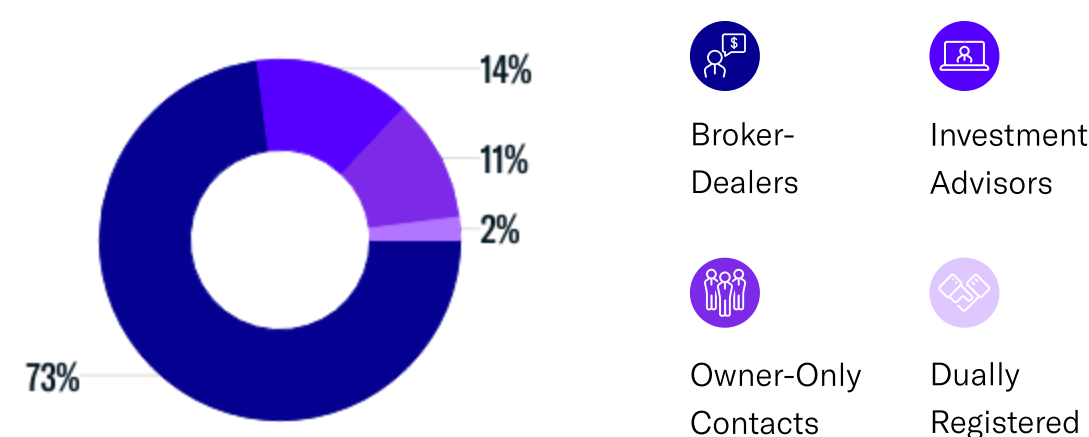
Firm Level

Nearly 60% of newly-added RIA firms displayed some allocation to real estate within their investment portfolios. Smaller fractions displayed interest in private placements, hedge funds, private equity and commodities, among various other alternative investments.



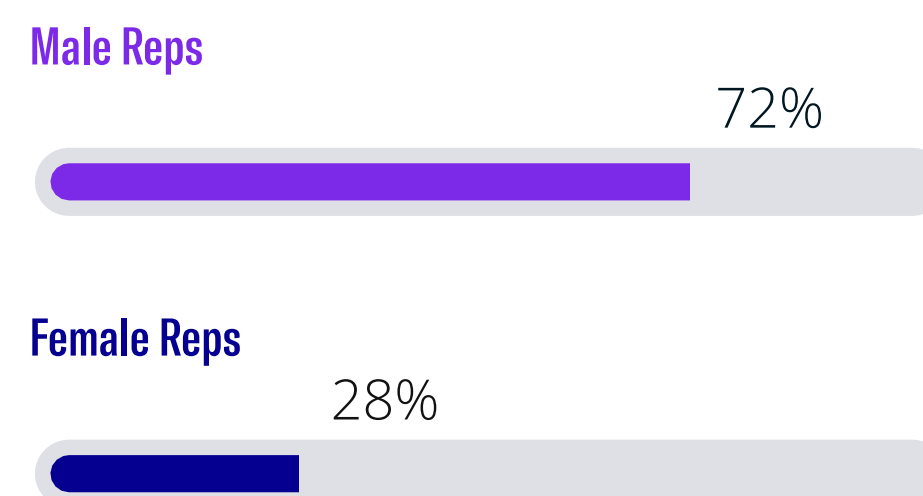
## Contact Breakdown by Rep Type

A majority (73%) of the newly added RIA representatives have registered as broker-dealers. Additionally, 14% of the additions are registered as investment advisors, while 11% are classified as owner-only representatives. A smaller segment, comprising just 2%, consists of dually registered contacts.



## 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.

The FINTRX private wealth database covers **4,000** family offices, **21,000+** family office contacts, **40,000+** registered investment advisor entities, and **750,000+** registered reps. Equipped with **375+** advanced search filters and numerous customization features, 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 much more.

FINTRX offers comprehensive profiles on each family office and investment advisor, enabling financial professionals to gain insights into assets under management, wealth origins, investment preferences, historical investments, favored sectors and industries, among other valuable information. Data for each record is sourced from **10+** public & private sources.

**Streamline investor discovery & boost your capital-raising efforts today!**

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