FINTRX

INSTITUTIONAL SALES

FINTRX Use Cases & Value Drivers for Deal-Making Professionals

Use-Cases

- Leverage comprehensive private wealth data to identify potential buyers for your unique products.
- Get market insights with up-to-date stock and ETF portfolio information. Drill into current 13F holdings and securities by type, sector, provider and more.
- Leverage your personal network and relatability scoring to target industry professionals more effectively and efficiently.
- Access accurate contact information for key decision-makers and prep for your meetings with insights into education & work backgrounds as well as hobbies, interests and affiliations.
- Stay informed about current investment activity and market trends through the News Portal with direct links to articles and firm profiles.
- Utilize the custom smart lists and dynamic mapping features to streamline your prospecting and stay up-to-date on contact & firm changes.
- Integrate FINTRX data with existing workflows and systems using the API data feed to enhance deal sourcing and monitoring processes.

Value-Drivers

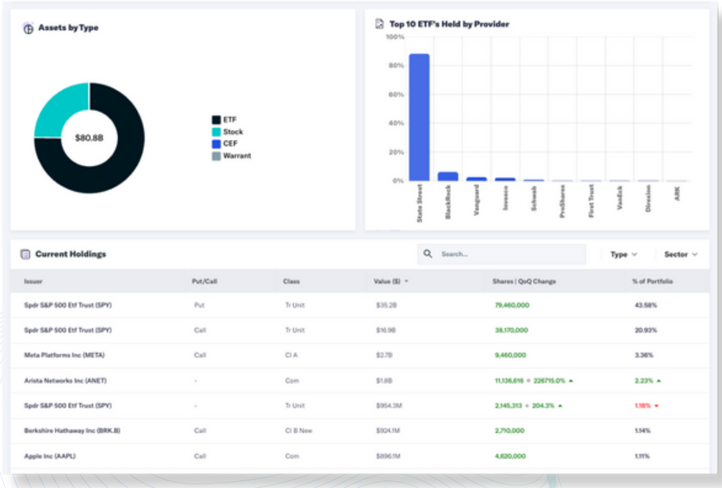
- Maximize value by leveraging FINTRX insights for informed prospecting, securing profitable deals with confidence.
- Increase deal success by identifying target firms through current holdings and investment strategies & preferences.
- Enhance ROI by identifying key contacts and decision-makers with ease, and leveraging network and personal connections for warmer introduction opportunities.
- Save time & effort by utilizing accurate contact information and direct links, facilitating efficient outreach and relationship building.
- Optimize efficiency by analyzing stock & ETF portfolios, AUM & strategies to pinpoint ideal partners for successful deal execution.
- Streamline prospecting by utilizing smart lists and dynamic mapping to build & manage relationships with key contacts, track communication history and ensure personalized engagement.
- Boost deal success by leveraging comprehensive private wealth data to identify potential buyers, ensuring targeted outreach for effective results.

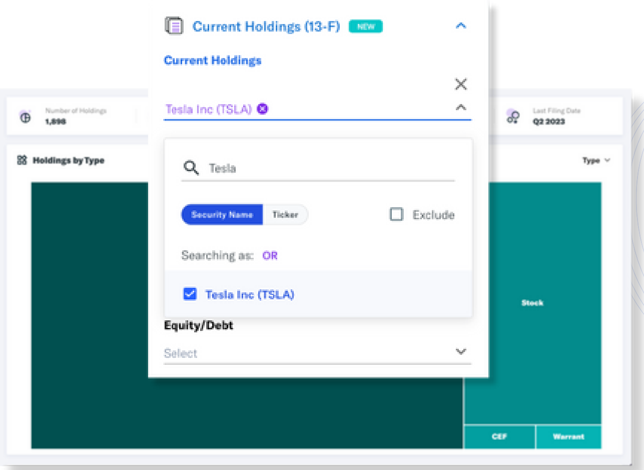
FINTRX Solves Critical Pain Points Such As...

- Finding the right contacts for getting in the door and closing deals
- Facilitating easy & efficient team-wide organization and communication
- Having all the tools to prep for meetings at your fingertips
- Accessing prospecting & deal management in one unified platform
- Sorting through thousands of firms & contacts instantly to find potential buyers

Track 13-F Securities Data

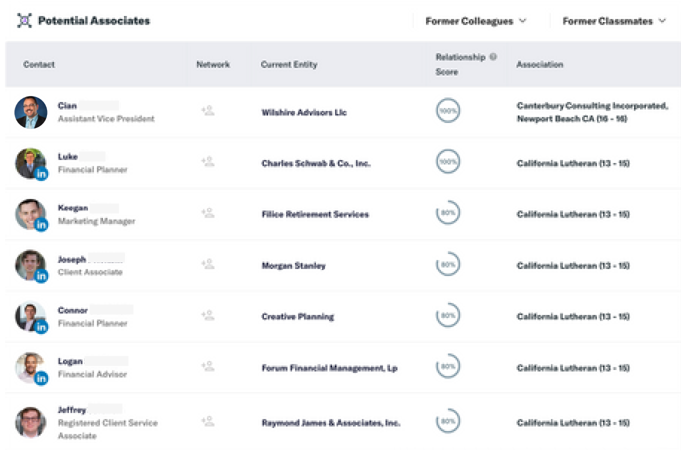
Monitor and analyze ETF & equity portfolios and uncover industry stock market trends.





Utilize the full suite of 13-F filters to drill into individual tickers, holding amounts, types of securities, changes over time and more.

Leverage Comprehensive Contact Profiles



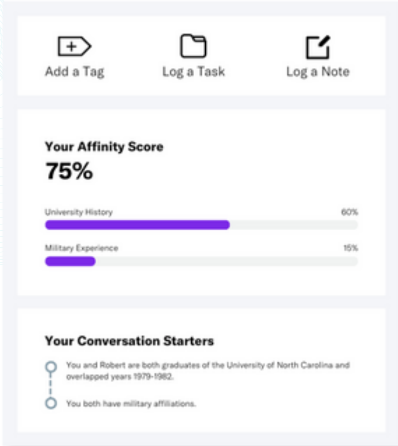
Leverage your network for warmer introduction opportunities.

Photography

Cooking

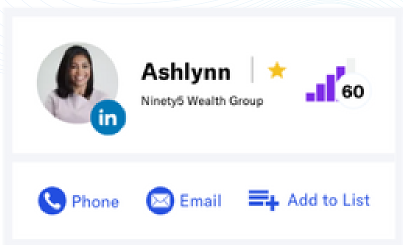
Fishing

Craft more effective sales pitches with custom conversation starters & personal details such as hobbies, university background or board affiliations.



Utilize Affinity relatability scoring for a more targeted approach.

Access accurate direct contact information and LinkedIn profiles.



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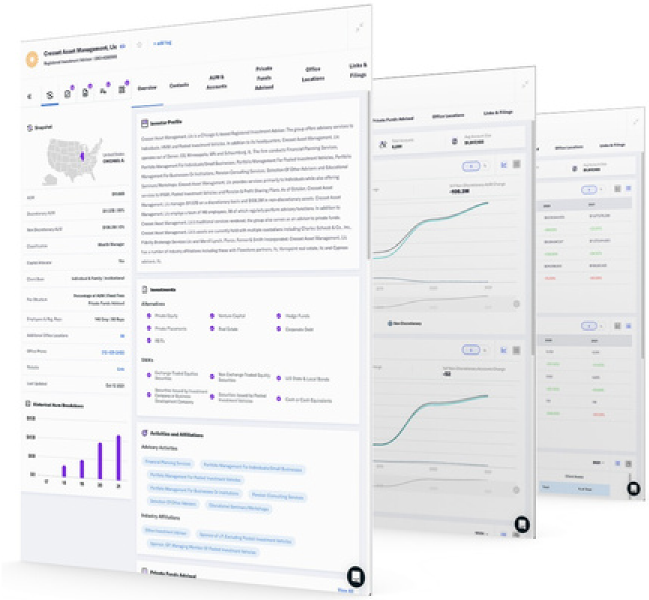


FINTRX Overview

FINTRX is a private wealth data intelligence platform that provides global financial firms a centralized source for in-depth & credible insights on family office, registered investment advisor (RIA) & broker dealer data. It's specifically designed for asset-raising professionals to source accurate data while increasing efficiency and saving valuable time.

FINTRX sources data from both public and private sources and is comprised of 75+ researchers who map, validate and compile data daily to ensure accuracy.

850K+

Registered Investment Advisor (RIA) & Broker Dealer Records

25K+

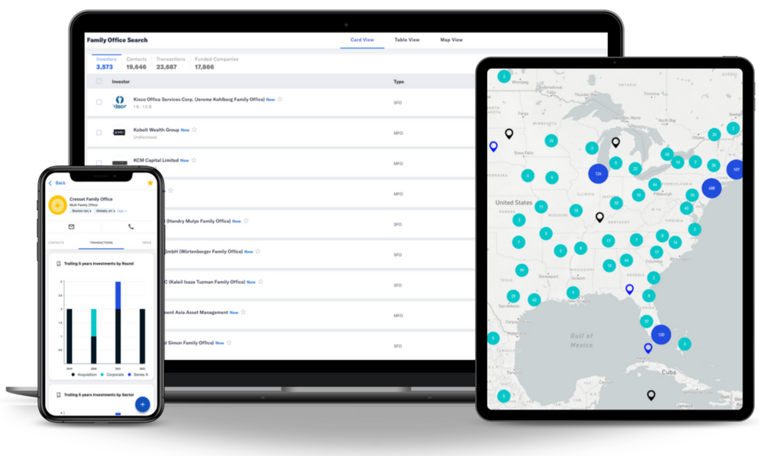
Family Office Records

$115 Trillion+

Managed Assets Tracked

600K

Email Addresses of Key Investment Professionals



Join the hundreds of institutional sales professionals who trust our unparalleled data & savvy prospect management tools to source new clients and build effective relationships...

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