

INSTITUTIONAL SALES & DISTRIBUTION

FINTRX Use Cases & Value Drivers for Deal-Making Professionals

Use Cases

- + Leverage comprehensive wealth management data to [identify potential buyers](#) for your unique financial products.
- + Get market insights with [in-depth stock and ETF portfolio data](#). Drill into active & passive ETF holdings, track historical allocations, and easily prospect into thousands of institutional investors with ETF filters across various asset classes.
- + Leverage your [personal network and advanced relationship mapping](#) to target relevant industry professionals more effectively and efficiently.
- + Access [accurate contact information](#) and prep for your meetings with insights into education & work backgrounds, hobbies, interests and more.
- + Stay up-to-date on current investment trends, contact movements, firm updates and more with [custom alerts & notifications and dynamic lists](#). Access actionable news with direct links to articles, filings and websites.
- + [Integrate FINTRX data directly into your existing workflows and tech stacks](#) to streamline deal sourcing and prospecting processes.

Value Drivers

- + [Maximize value](#) by leveraging FINTRX-proprietary ETF and fund insights for informed prospecting, identifying key business opportunities with ease.
 - + [Increase deal success](#) by identifying target firms through current portfolio breakdowns, allocation preferences, and investment strategies.
 - + [Improve outreach efforts](#), easily identifying key contacts and decision-makers and leveraging relationship mapping and personalized details for warmer introduction opportunities.
 - + [Save time and effort](#) by utilizing AI-powered searching to automate research processes & drill down into thousands of investors in seconds.
 - + [Optimize efficiency](#) with insights into investment portfolios, AUM and strategies to pinpoint ideal partners for successful deal execution. Utilize smart lists to manage your relationships, track communication history and ensure personalized engagement.
 - + [Enhance ROI](#) by distributing financial products directly to broker dealers, RIAs, advisor teams and key institutional investors.
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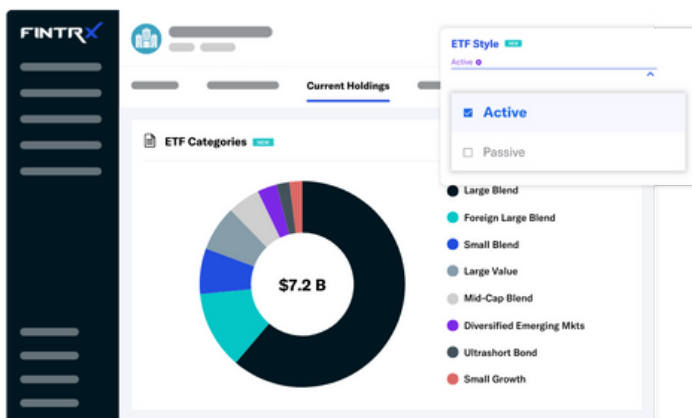
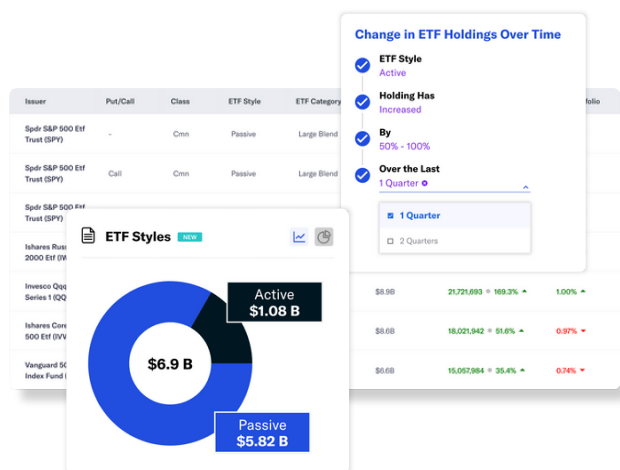
FINTRX Solves Critical Pain Points Such As...

- ✓ Drilling into in-depth insights and analytics on firm ETF holdings and allocation preferences
- ✓ Finding the right contacts for getting in the door and closing deals
- ✓ 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

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Leverage In-Depth ETF & Equity Data

Monitor and analyze ETF & equity portfolios and uncover industry investment trends.



Leverage search filters to easily prospect into thousands of institutional investors, pinpoint RIAs by investment portfolios across various asset classes, and uncover key business opportunities.

Make Warmer Connections With Key Prospects

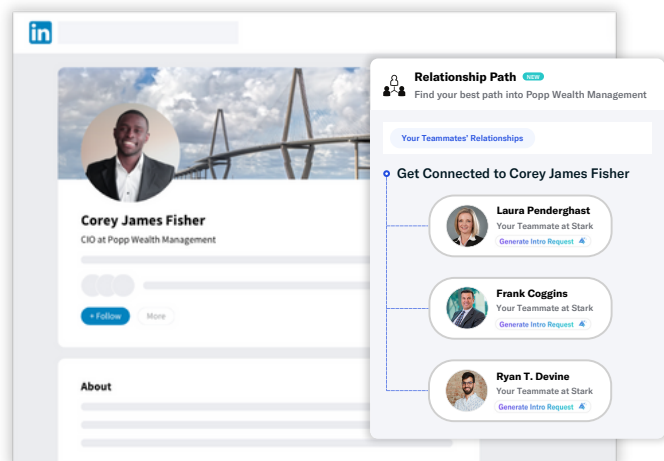
Leverage your network for warmer introduction opportunities.

Photography

Cooking

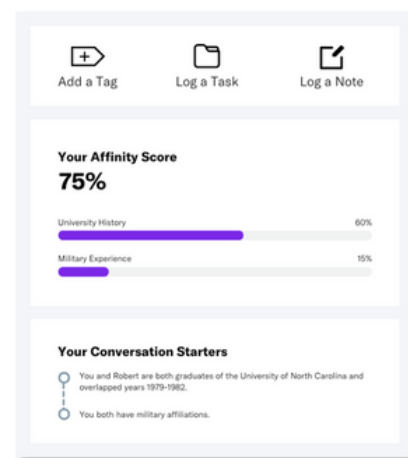
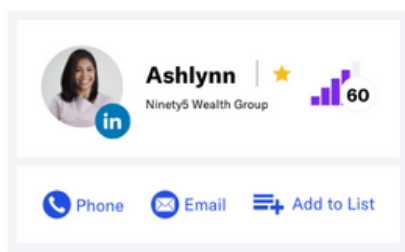
Fishing

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



Find your best path into any firm or contact with Relationship Path.

Utilize Affinity relatability scoring for a more targeted approach.





About FINTRX

[FINTRX](#) is a wealth management data platform that enables wealth professionals, financial institutions, and asset management firms to seamlessly map, access, and sell into the RIA, broker dealer, wirehouse, and global family office ecosystems. With advanced AI technology and comprehensive data on **850,000+** financial entities and contacts, FINTRX empowers industry professionals to make more informed decisions, build stronger relationships, and drive business growth. Access to FINTRX data is delivered via its award-winning cloud-based platform, fully integrated [iOS mobile apps](#), and many [CRM and API connectors](#), including Salesforce, Navatar, HubSpot, Snowflake, and others.

850K+

RIA & Broker Dealer Records

\$115 Trillion+

Managed Assets Tracked

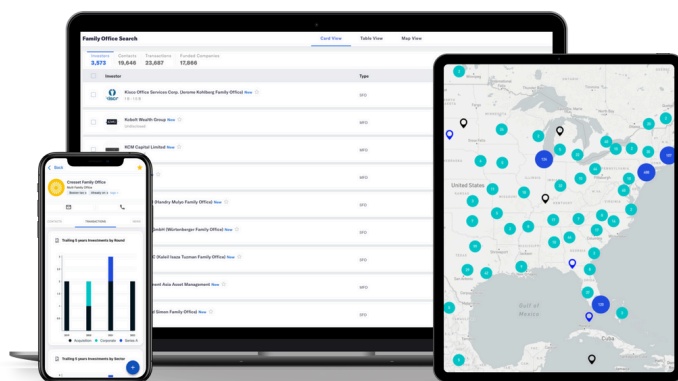
600K+

Email Addresses of Decision-Makers

100K+

Monthly Data Updates

BOOK A DEMO



Join the hundreds of financial sales professionals who trust our unparalleled data and efficient prospect management tools to source new clients and build effective industry relationships...



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sales@fintxr.com



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