

## **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 <u>API data feed</u> 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

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Photography

# Track 13-F Securities Data

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

	Current Holdings	
<ul> <li>Number of Holdings</li> <li>1,898</li> </ul>	Tesla Inc (TSLA) O	Q2 2023
Holdings by Type	Q Tesia	Type V
	Security Name Ticker Exclude	
	Searching as: OR	
	Tesla Inc (TSLA)	Stock
	Equity/Debt	
	Select	

6 Assets by Type	ETF Stock CCF Warrett		2015	Varganda Invesses Forbares Profilemen	Particus Vadas Bronias Abs
Current Holdings			Q, Sear	ih	Type ~ Sector ~
issuer	Put/Call	Class	Value (S) ~	Shares   QoQ Change	% of Portfolio
Spdr S&P 500 Etf Trust (SPY)	Put	Tr Unit	\$35.28	79,460,000	43.58%
Spdr S&P 500 Ett Trust (SPY)	Call	Tr Unit	\$16.98	38,170,000	20.93%
Meta Platforms Inc (META)	Call	CLA	\$2.70	9,460,000	3.36%
Arista Networks Inc (ANET)		Com	\$1.88	11.336.616 + 226715.0%	2.23% -
Spdr S&P 500 Etf Trust (SPY)		Tr Unit	\$954.3M	2,345,313 + 204,3% *	1.055 -
Berkshire Hathaway Inc (BRK.8)	Cull	CI B New	\$904.1M	2,710,000	15475
Apple Inc (AAPL)	Call	Com	\$896.1M	4,620,000	1.11%

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

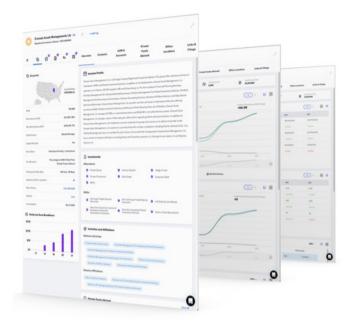
Leverage your network

### Leverage Comprehensive Contact Profiles

for warmer introduction Cooking 🐹 Potential Associates ormer Cla opportunities. Fishing Networl Cian Assistant Vice Pri 0005 Consulting Inc-ich CA (16 - 16) Craft more effective sales pitches with Euke Financial Planner 000 ab & Co., Inc. a Lutheran (13 - 15) custom conversation starters & personal details such as hobbies, university Keegan Marketing Manage (80%) utheran (13 - 15) background or board affiliations. Client Associate 600 iran (13 - 15) Connor Financial Planner (005) ieran (13 - 15) Ð C Ľ Eogan Financial Advise (00) ia Lutheran (13 - 15) Add a Tag Log a Task Log a Note (005) 8 a Lutheran (13 - 15) Your Affinity Score 75% Ashlynn 🛛 🖈 Utilize Affinity relatability scoring 60 Ninety5 Wealth Group for a more targeted approach. a and Robert are both graduate vlapped years 1979-1982. Access accurate direct contact C Phone 🖂 Email Add to List You both have military affi 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**+

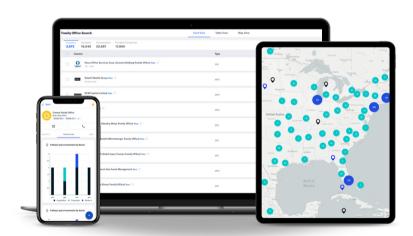
**Family Office Records** 

## \$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...





