

## INVESTMENT BANKING

# FINTRX Use Cases & Value Drivers for Deal-Making Professionals

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### Use Cases

- + Leverage comprehensive wealth management data to easily [identify potential clients](#) for M&A and capital-raising advisory services.
- + Analyze the [direct investment activity](#) of family offices and RIAs to identify direct and indirect existing investments as well as potential buyers and co-investors for transactions.
- + Identify firms with [expertise in specific industries or sectors](#) relevant to M&A and capital-raising opportunities.
- + Utilize the [keyword search functionality](#) to identify firms involved in specific M&A deals or industries.
- + Leverage [advanced relationship mapping and accurate contact information](#) to target relevant industry professionals more effectively.
- + Stay up-to-date on family office, RIA and broker dealer investment trends and M&A activity with [custom alerts & notifications and dynamic lists](#). Access industry-specific M&A news with direct links to articles, filings and websites.
- + [Integrate FINTRX data directly into your existing workflows and tech stacks](#) to enhance M&A deal sourcing and prospecting processes.

### Value Drivers

- + [Maximize value](#) by leveraging FINTRX insights for informed M&A and capital-raising strategies, identifying key business opportunities & securing profitable deals with confidence.
  - + [Increase M&A deal success](#) by identifying target companies through family office and RIA direct investment activity.
  - + [Improve outreach efforts](#). Easily identify key decision-makers involved in M&A deals, access up-to-date contact information, and leverage relationship mapping and personalized details for warmer introduction opportunities.
  - + [Save time and effort](#) by utilizing AI-powered search to automate research processes & parse through thousands of transactions in seconds.
  - + [Optimize efficiency](#) by analyzing managed assets and strategies of M&A-focused RIAs to pinpoint ideal partners for successful deal execution.
  - + [Streamline prospecting](#) by utilizing custom smart lists and dynamic mapping for efficient M&A efforts, thus optimizing resources.
  - + [Enhance ROI](#) by leveraging comprehensive data to identify potential M&A advisory clients, ensuring targeted outreach for effective results.
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### Key Search Filters

- |                         |                       |                          |                    |                       |
|-------------------------|-----------------------|--------------------------|--------------------|-----------------------|
| ✓ SEC Registered Status | ✓ Geographic Location | ✓ Investment Preferences | ✓ Investment Stage | ✓ Firm Classification |
| ✓ Investment Date Range | ✓ AUM Range & Growth  | ✓ Contact Title & Roles  | ✓ Transaction Type | ✓ Wealth Origin       |

## Direct Transactions Module

Investors  
**2,500+**

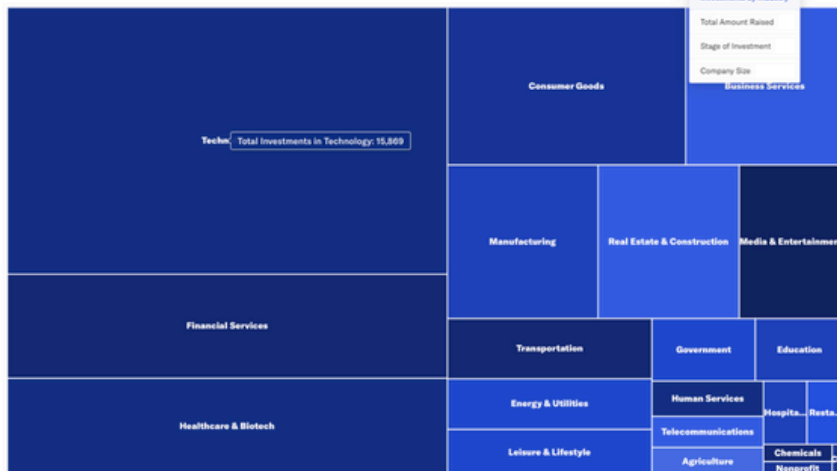
Funded Companies  
**18,500+**

Transactions  
**27,000+**

Follow-On Investments  
**4,800+**

Examine direct investment activity to find relevant business opportunities and pinpoint specific M&A targets.

Transactions Heat Map



Search direct transactions...

Create Transaction Alert

Filter

Date	Investor	Companies	Stage	Size Of Round	Sector	Industry	Country
Jul 2023	Vista	Tricer	Acquisition	Undisclosed	Financial	Financial	Hong Kong
Jul 2023	Premji Invest (Aum Premji F...	Cuttle	Series A	\$ 15,000,000	Business	Marketing	United States
Jul 2023	HC Private Investments	QEL, Inc.	Acquisition	Undisclosed	Manufac	Automatio	United States
Jul 2023	Ziad Growth Solutions Pa...	Bloom Money	Pre-Seed	\$ 1,300,000	Financial	Financial	United Kingdom
		ScorePlay	Seed	\$ 5,000,000	Media & ...	Sports	Portugal
		Protect AI	Series A	\$ 35,000,000	Governm	Security	United States
		Ampcontrol	Series A	\$ 10,000,000	Energy & ...	Energ	United States
		Aurora Financial Group, LLC	Acquisition	Undisclosed	Financial	Investment	United States
		GIMO	Series A	\$ 17,000,000	Financial	Financial	Vietnam
		Alber's U.S. Private Market...	Acquisition	Undisclosed	Financial	Financial	United States
		Gossamer Bio	Post-IPO Equity	\$ 210,000,000	Healthca	Biotech	United States

25,000+ Tracked Investments

Use FINTRX tools to...

- Streamline company and investor research
- Optimize deal origination and pipeline generation
- Save time by prospecting into the right allocators at the right time
- Identify decision makers responsible for evaluating private companies
- Make better connections with key M&A personnel

FINTRX

Investors Contacts Transactions Relationships

Relationships

Emery

Relationships:

Michael

Relationships:

Stephen

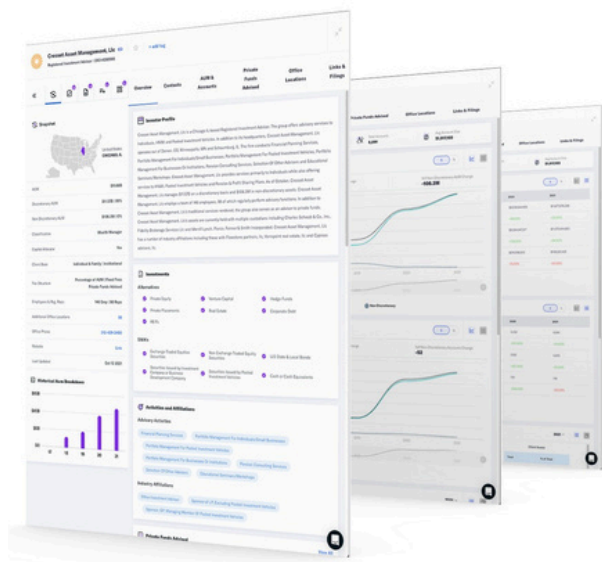
Relationships:

Michelle

Relationships:

New since you've last viewed this li

# INVESTMENT BANKING



## 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

**28K+**

Family Office Records

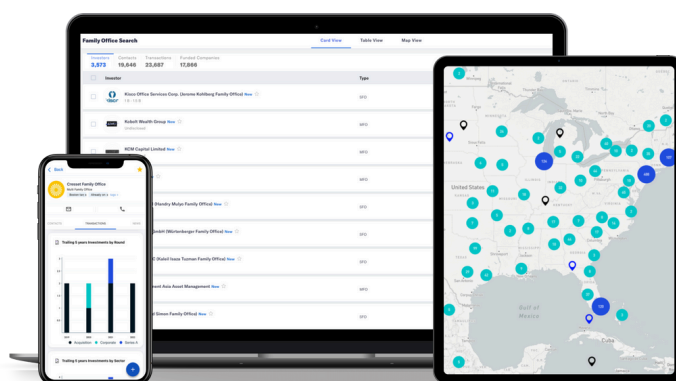
**\$115 Trillion+**

Managed Assets Tracked

**600K+**

Email Addresses of Decision-Makers

**BOOK A DEMO**



Join the [hundreds of investment banking professionals](#) who trust our unparalleled data and efficient prospect management tools to source deal partners and build effective industry relationships...



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