

INVESTMENT BANKS

FINTRX Use Cases & Value Drivers for Dealmaking Professionals

Use-Cases

- Leverage comprehensive private wealth data to [identify potential investment banking clients](#) for M&A and capital-raising advisory services.
- [Analyze the direct investment activity](#) of family offices and RIAs to [identify direct & indirect existing investments](#) as well as potential buyers & co-investors for transactions.
- Identify firms with [expertise or interest 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.
- Access [accurate contact information](#) for key decision-makers involved in M&A deals.
- Stay informed about family office and RIA investment activity with [industry-specific M&A trends and deal activity](#) through the [News Feed](#).
- Utilize the [custom smart lists](#) and [dynamic mapping features](#) to streamline M&A and capital-raising prospecting efforts.
- [Integrate FINTRX data with existing workflows](#) and systems using the [API data feed](#) to enhance M&A deal sourcing and monitoring processes.

Value-Drivers

- [Maximize value](#) by leveraging FINTRX insights for informed M&A and capital-raising strategies, securing profitable deals with confidence.
 - [Increase M&A success](#) by identifying target companies through family office and RIA direct investment activity.
 - [Enhance ROI](#) by identifying potential buyers or sellers for M&A transactions through the monitoring of direct investment activity.
 - [Save time & effort](#) by utilizing accurate contact information for key decision-makers involved in M&A deals, facilitating efficient outreach & relationship building.
 - [Boost efficiency](#) by analyzing AUM & 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.
 - [Boost deal success](#) by leveraging comprehensive private wealth data to identify 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

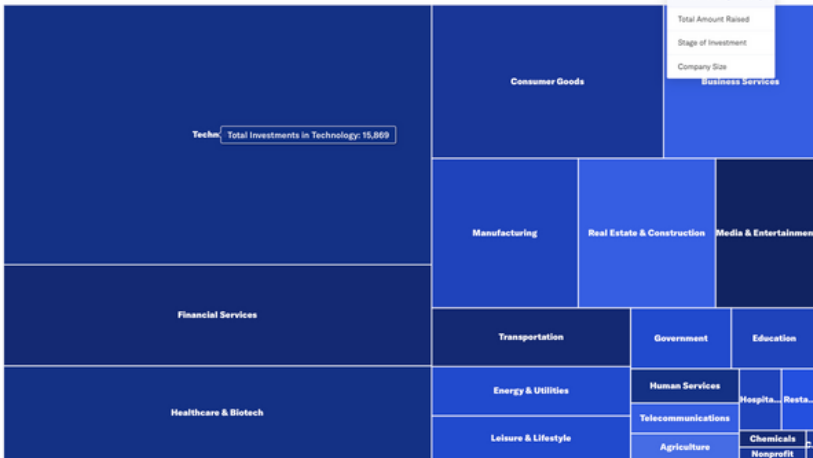
Investors 1,949 |
 Private Companies 18,856 |
 Transactions 25,165 |
 Follow-On Investments 4,360

Examine the direct investment activity of family offices & RIAs to find more relevant opportunities and pinpoint specific M&A targets.

Search direct transactions... [Create Transaction Alert](#) [Filter](#)

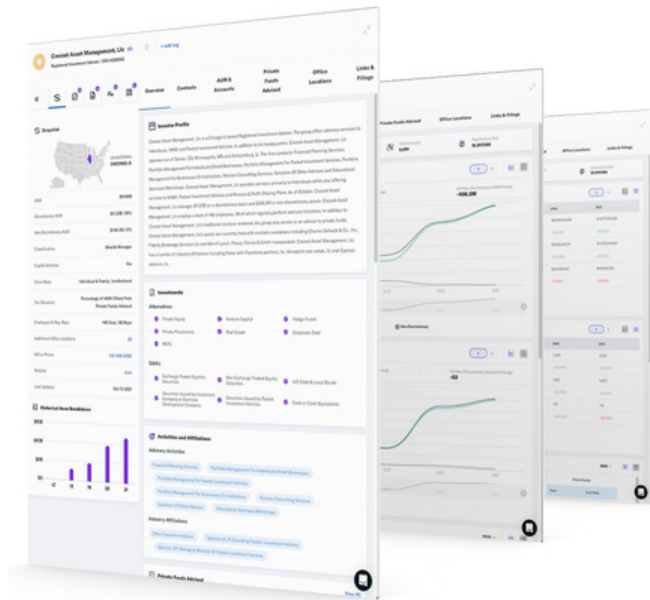
Date	Investor	Companies	Stage	Size Of Round	Sector	Industry	Country
Jul 2023	Vistra	Tricor	Acquisition	Undisclosed	Financial	Financial	Hong Kong
Jul 2023	Premji Invest (Azim Premji F...)	Coetla	Series A	\$ 15,000,000	Business	Marketing	United States
Jul 2023	HC Private Investments	QEI, Inc.	Acquisition	Undisclosed	Manufac	Automatio	United States
		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
		Ampercontrol	Series A	\$ 10,000,000	Energy & ...	Energy	United States
		Aurora Financial Group, LLC	Acquisition	Undisclosed	Financial	Investment	United States
		GIMO	Series A	\$ 17,000,000	Financial	Financial	Vietnam
		Abird's U.S. Private Market...	Acquisition	Undisclosed	Financial	Financial	United States
		Gossamer Bio	Post-IPO Equity	\$ 212,000,000	Healthca	Biotech	United States

Transactions Heat Map



25,000+ Tracked Investments

- Streamline private company & 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



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+

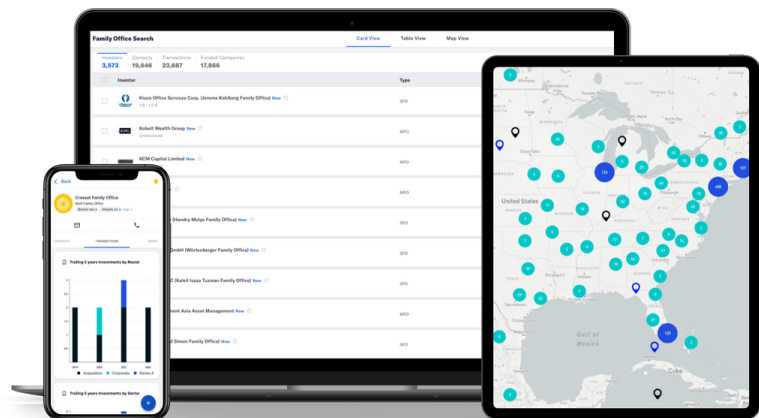
Family Office Records

\$115 Trillion+

Managed Assets Tracked

600K

Email Addresses of Key Investment Professionals



[Join the hundreds of investment banks](#) who trust our unparalleled data & savvy prospect management tools to source deal partners...

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sales@fintrx.com

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