



January 2023

Family Office & Registered Investment Advisor Data Report

MONTHLY PRIVATE WEALTH DATA REPORT



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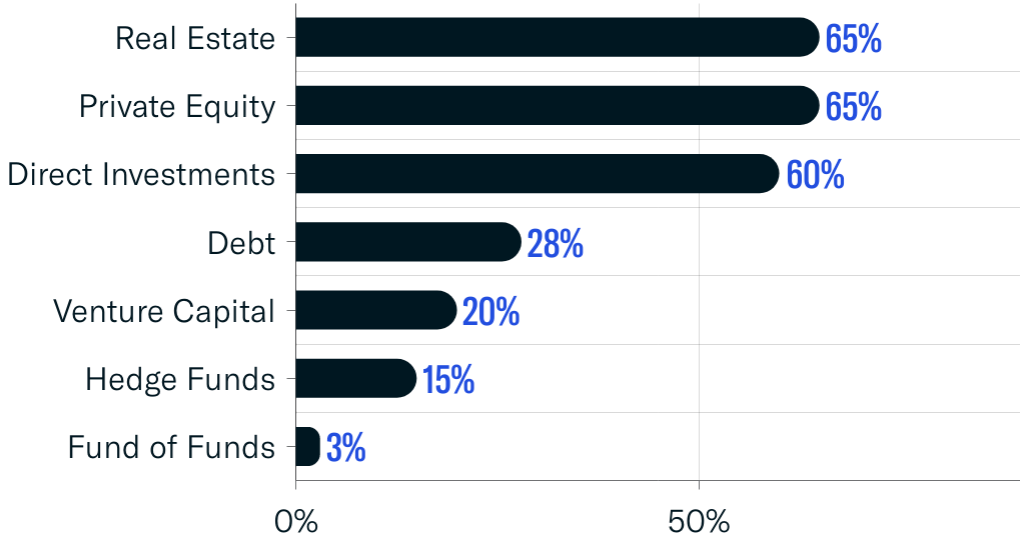
Family Office Data Report: January 2023

All data was compiled using the [FINTRX Family Office & Registered Investment Advisor \(RIA\) Data Platform](#)

Family Office Platform Updates & Additions

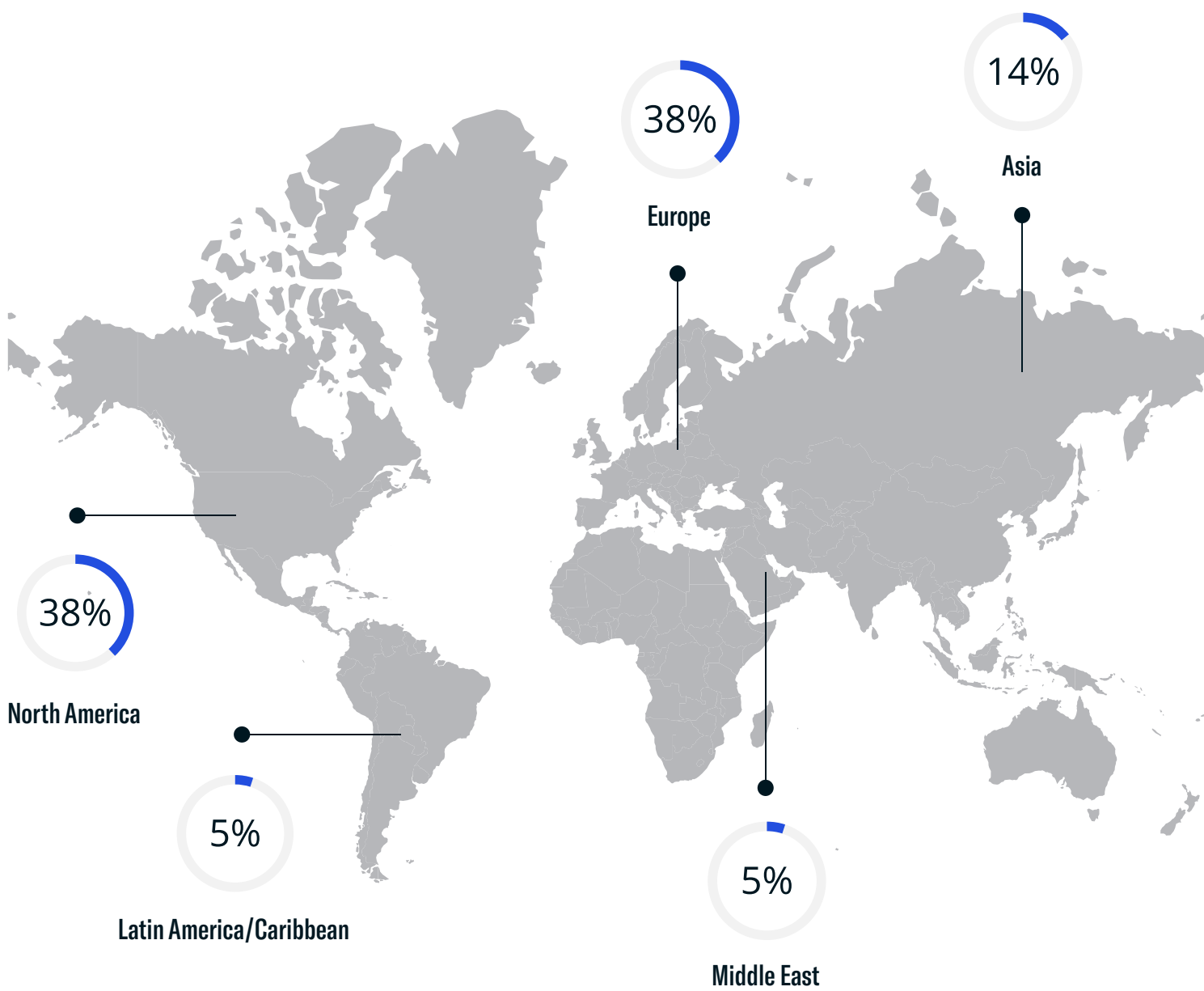
- New Family Offices: 40+
- New Family Office Contacts: 240+
- Total Family Office Additions: 580+
- Updated Family Office Entities: 680+
- Newly Tracked Family Office Investments: 290+
- New Family Office Data Points: 2,920+
- Total Family Office Assets Added: \$49.4B+

Asset Class Interest Breakdown



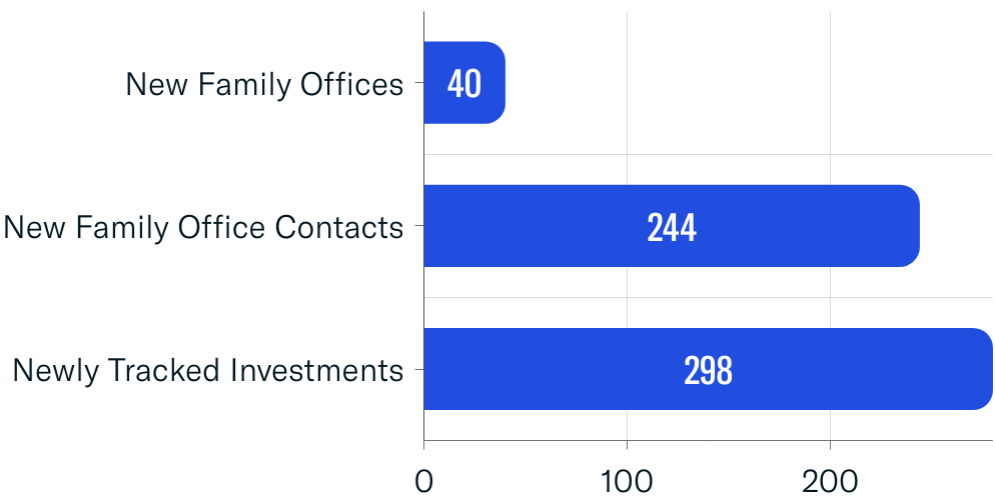
Family Office Geographical Breakdown

Regions with New Family Office Activity



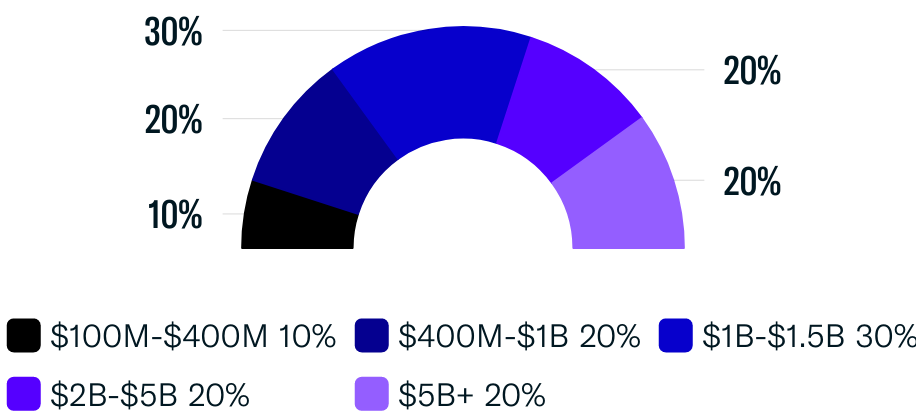
Family Office Platform Additions

Newly Added Family Offices, Family Office Contacts & Tracked Investments



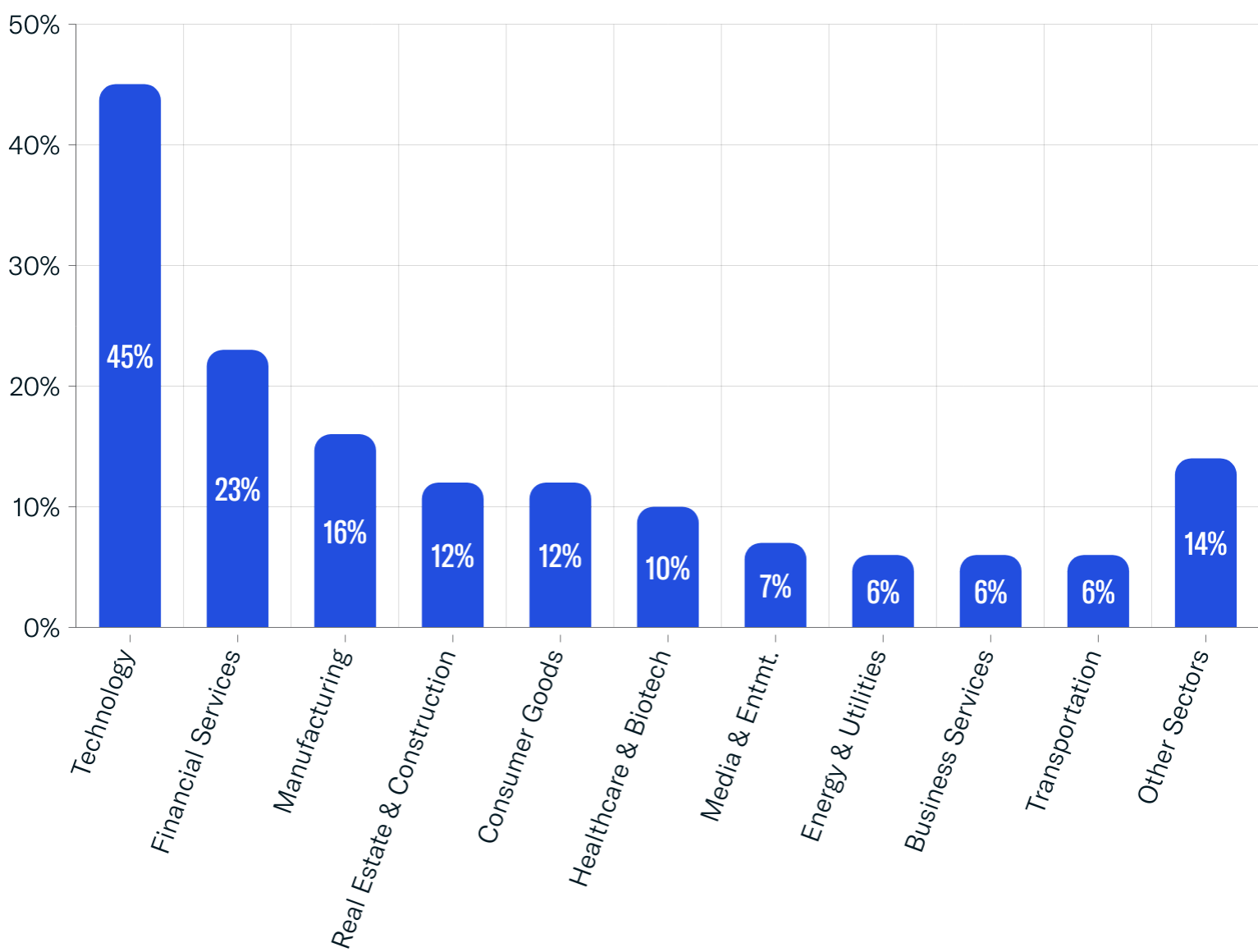
Assets Under Management (AUM)

Newly Added Family Offices that Disclosed their AUM



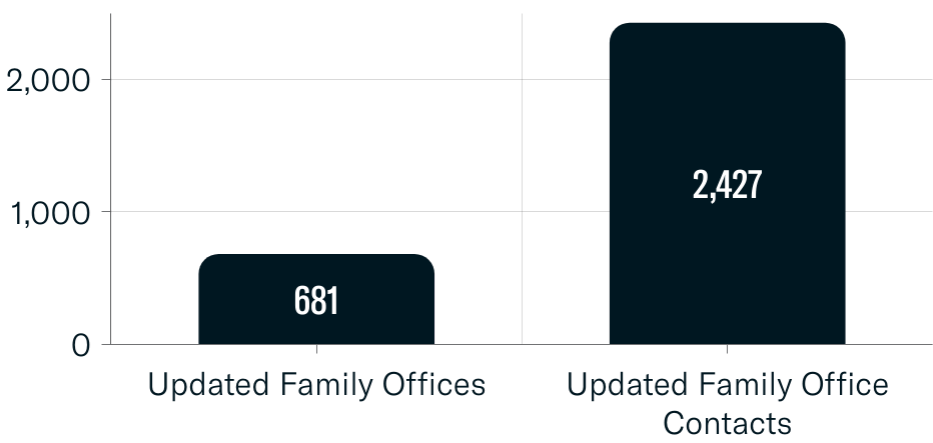
Newly Tracked Family Office Investments

Top 10 Sectors of Interest

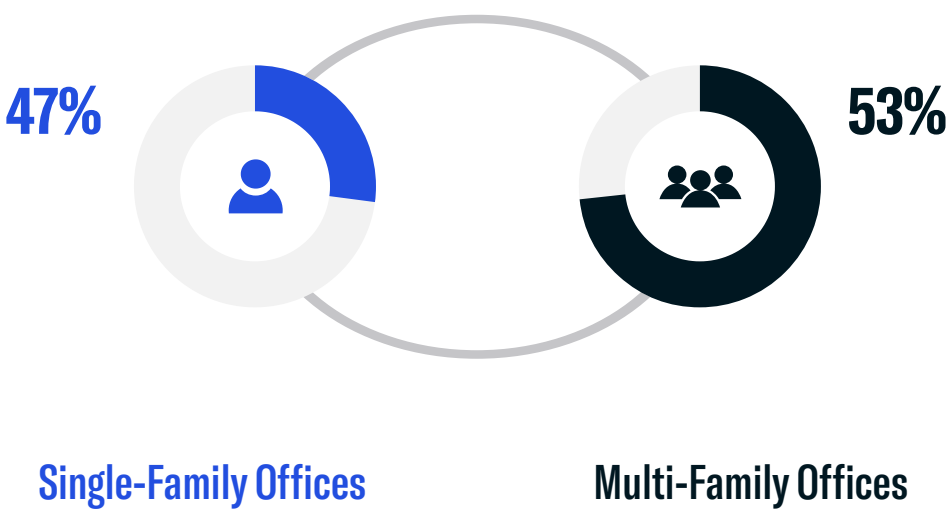


Updated Family Office Entities

Updated Family Offices & Family Office Contacts



Single-Family Offices vs Multi-Family Offices



Registered Investment Advisor (RIA) Data Report: January 2023



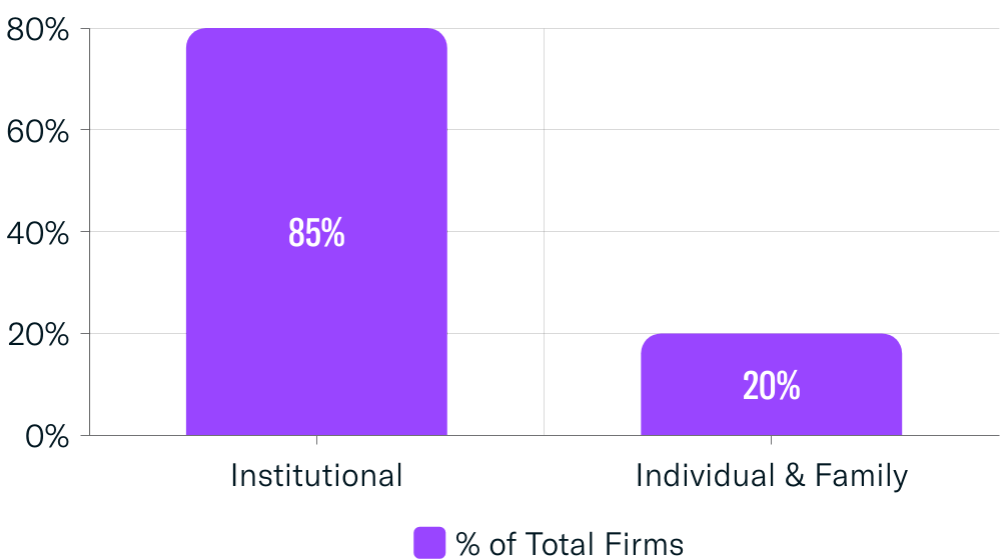
Data: [FINTRX Family Office & Registered Investment Advisor \(RIA\) Database](#)

RIA Data Highlights

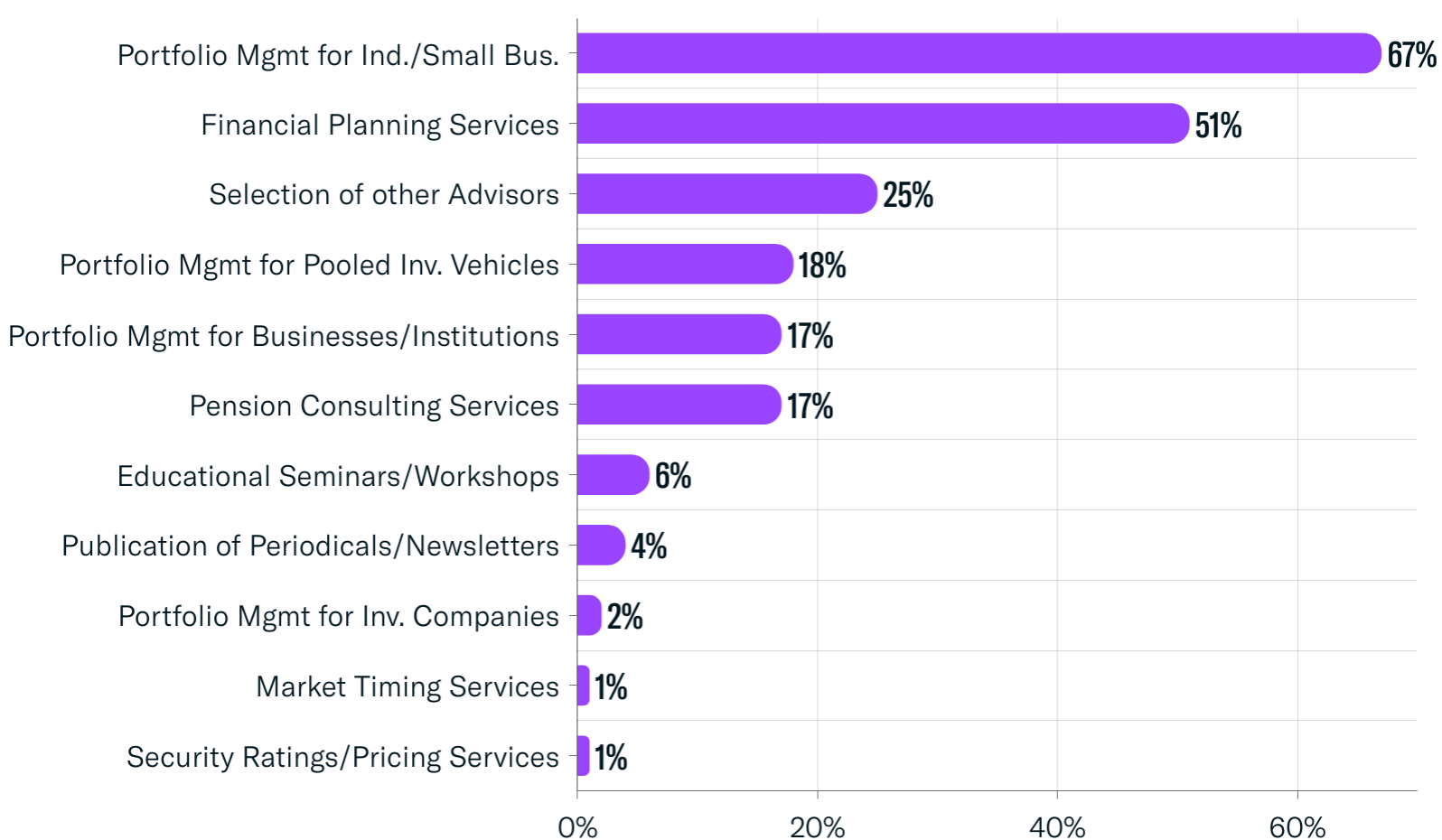
New Platform Additions for January

- Total Registered Entities (including Dually Registered): **130+**
- Total Registered Contacts: **5,440+**
- Total Accounts: **590+**
- Discretionary Accounts: **400+**
- Non-Discretionary Accounts: **170+**
- Firms Using Alternatives: **90+**
- Assets Under Management (AUM) Added: **\$83.4B+**

Client Breakdown



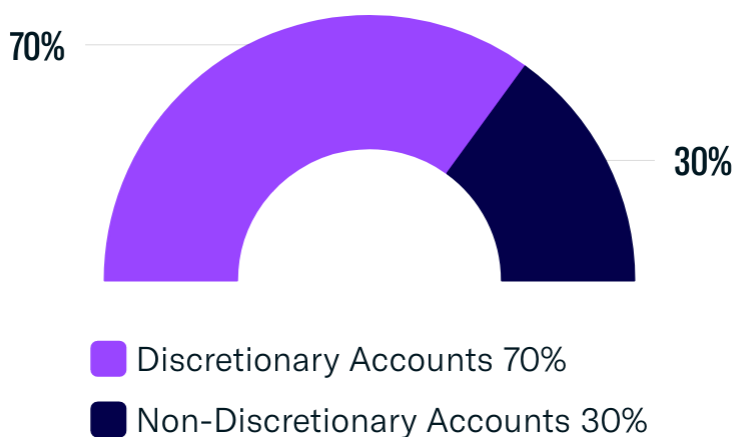
RIA Services Provided



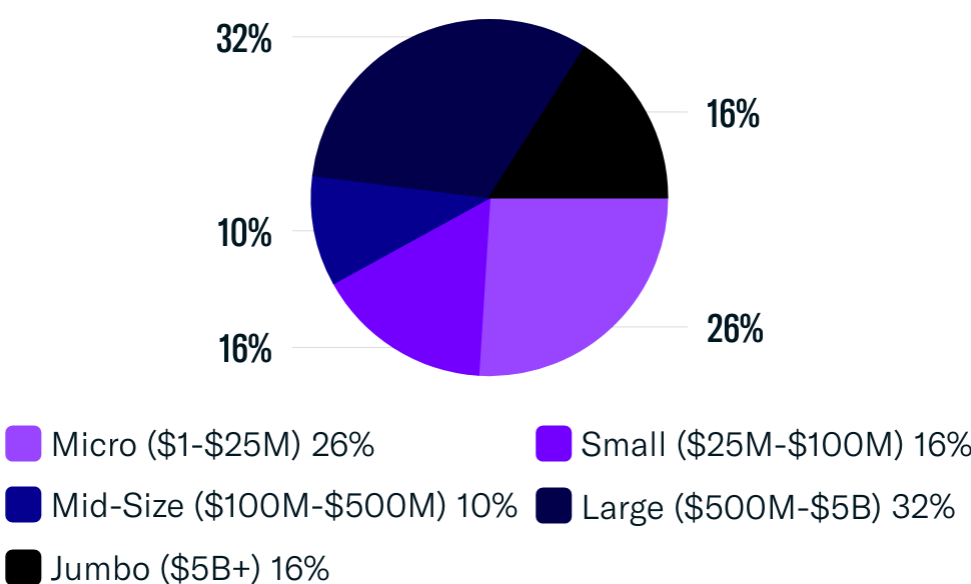
Registered Investment Advisory (RIA) Firms can and often have **more than one service** offered.

Accounts Breakdown

Discretionary vs Non-Discretionary Accounts Added

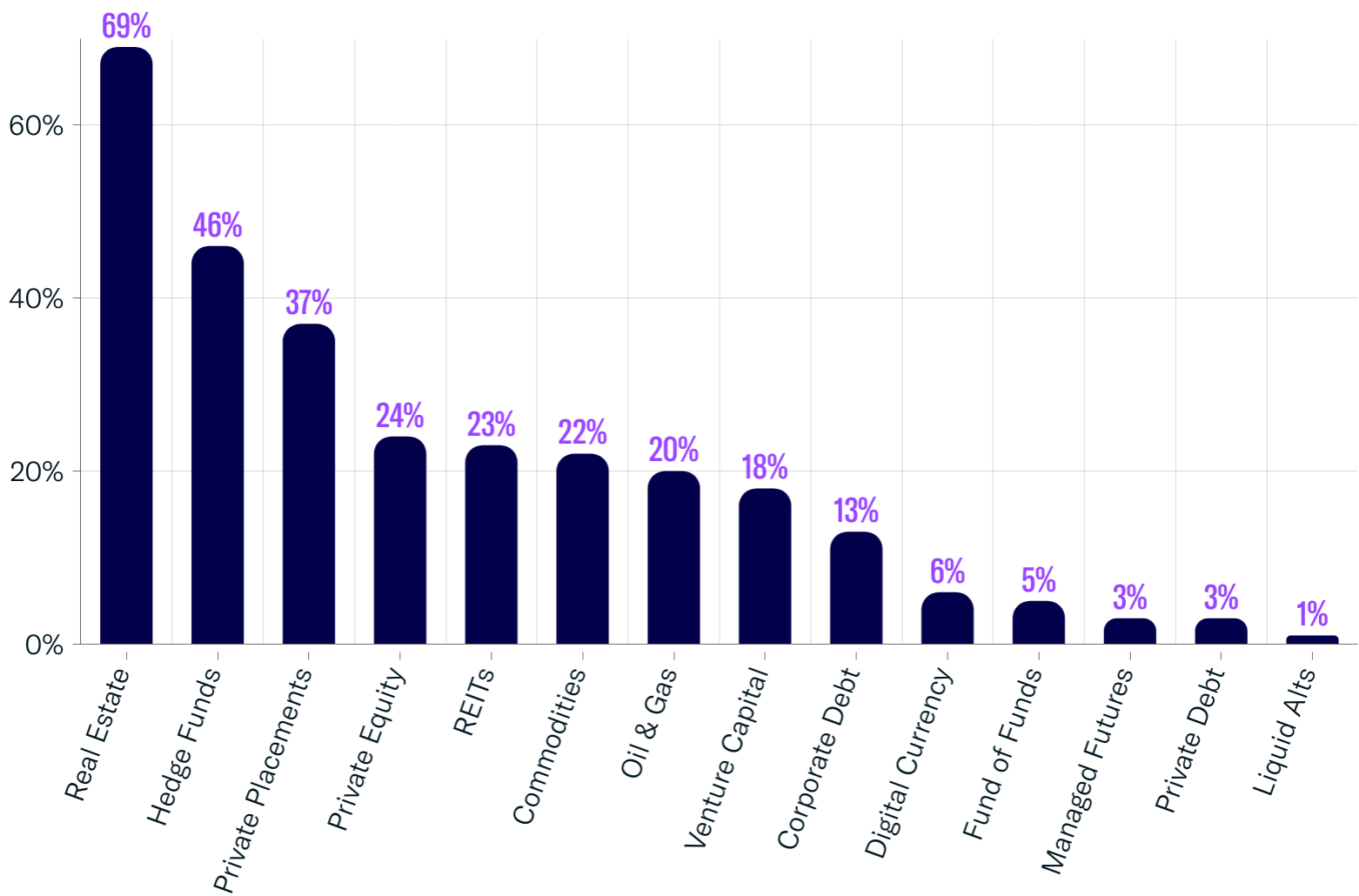


Firm Size by Assets Under Management



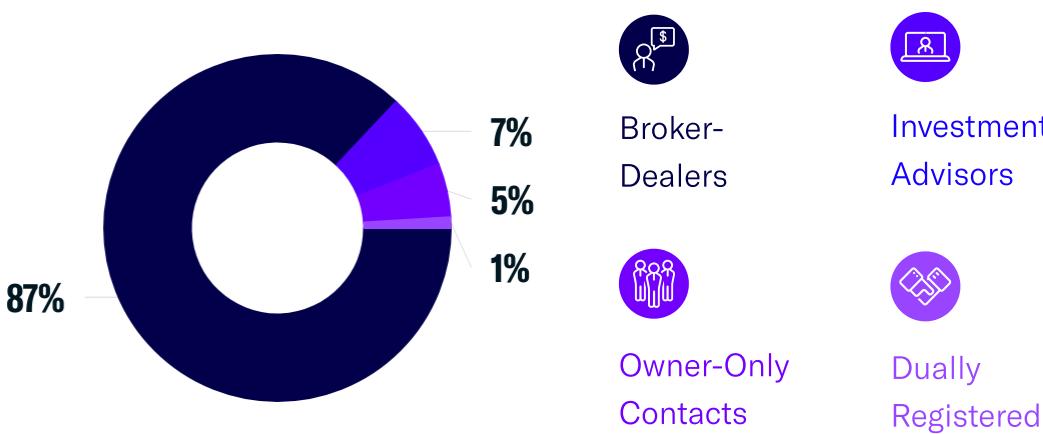
Alternative Investments Utilized

Firm Level



Representative/Contact Breakdown

By Rep Type



Rep Gender Breakdown

Male vs Female Reps

