



May 2023

Family Office & Registered Investment Advisor Data Report

MONTHLY PRIVATE WEALTH DATA REPORT



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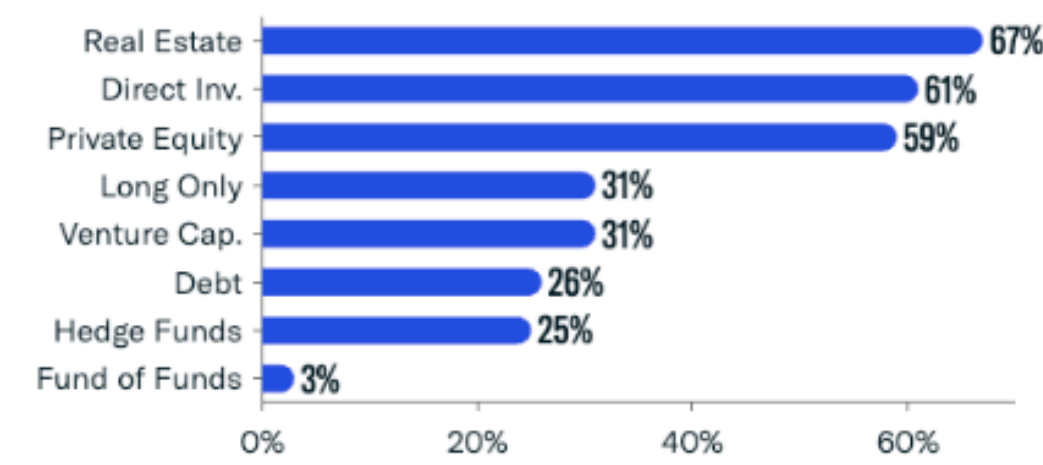
Family Office Data Report: May 2023

All data was compiled using the [FINTRX Family Office Data Platform](#)

Family Office Platform Updates & Additions

- New Family Offices: 61
- New Family Office Contacts: 350
- Total Family Office Additions: 830+
- Updated Family Office Entities: 4,515+
- Newly Tracked Family Office Investments: 420
- New Family Office Data Points: 4,300+
- Total AUM Added by New Firms: \$47.23 Billion

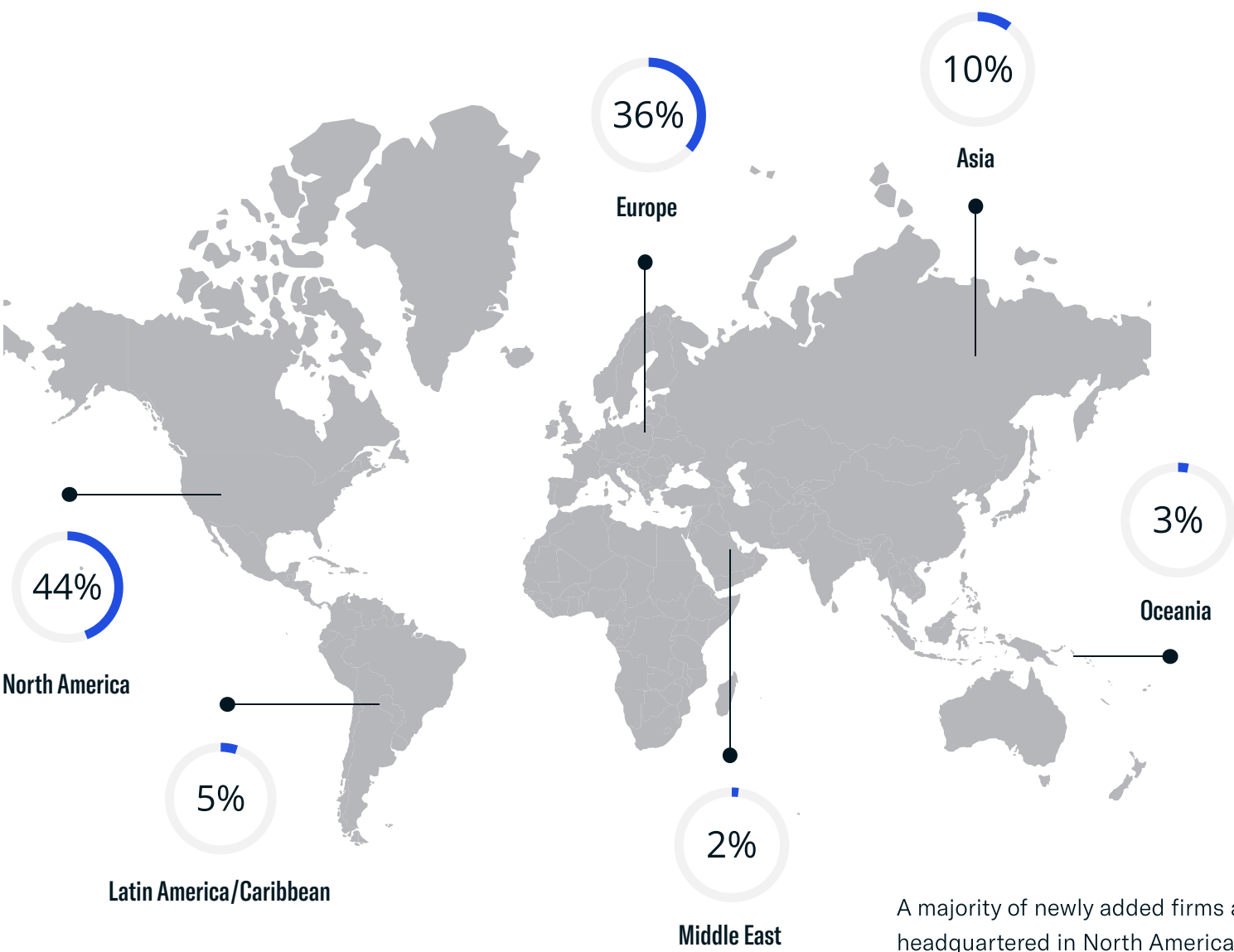
Asset Class Interest Breakdown



When it comes to the asset class interest of newly added family offices, FINTRX saw a majority of firms allocating to real estate, via direct investments into private companies and private equity.

Family Office Geographical Breakdown

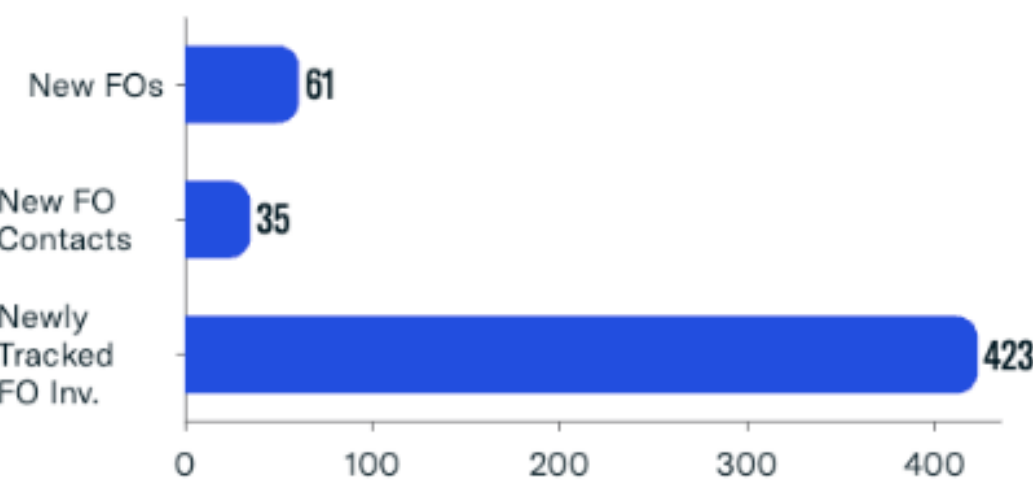
Regions with New Family Office Activity



A majority of newly added firms are headquartered in North America, accounting for 44%, while Europe is home to 36% of the new additions.

Family Office Platform Additions

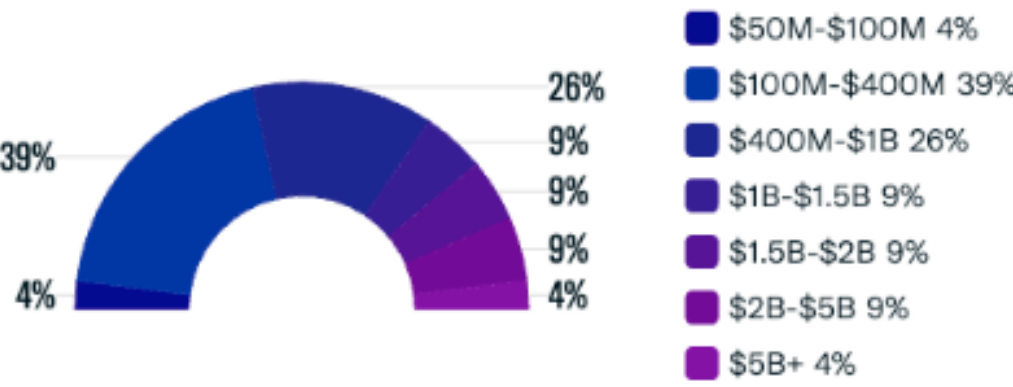
Newly Added Family Offices, Family Office Contacts & Tracked Investments



Assets Under Management (AUM)

Newly Added Family Offices that Disclosed their AUM

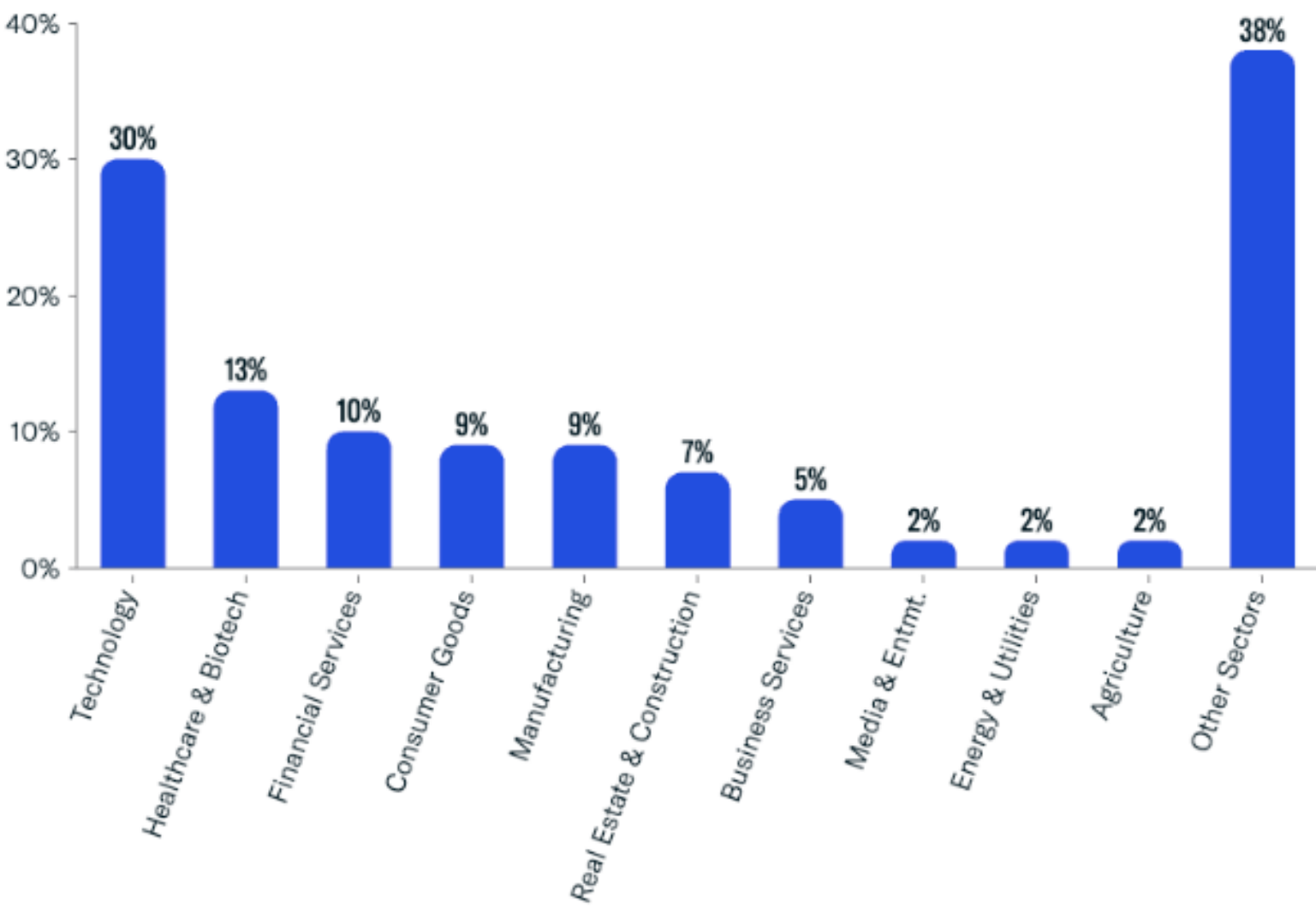
A majority (39%) of newly added firms (that disclosed their AUM) have assets between \$100M and \$400M.



Newly Tracked Family Office Investments: Top 10 Sectors of Interest

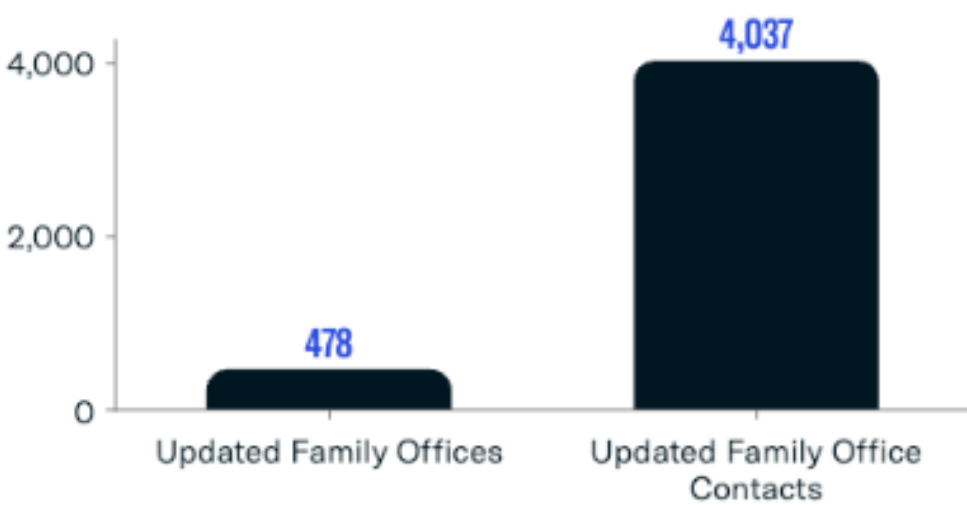
A significant portion of newly added family offices showed direct investment activity in the technology sector with nearly 130 investments made. Other sectors attracting attention included healthcare & biotechnology, financial services, consumer goods and manufacturing.

420+ Newly Tracked Family Office Investments

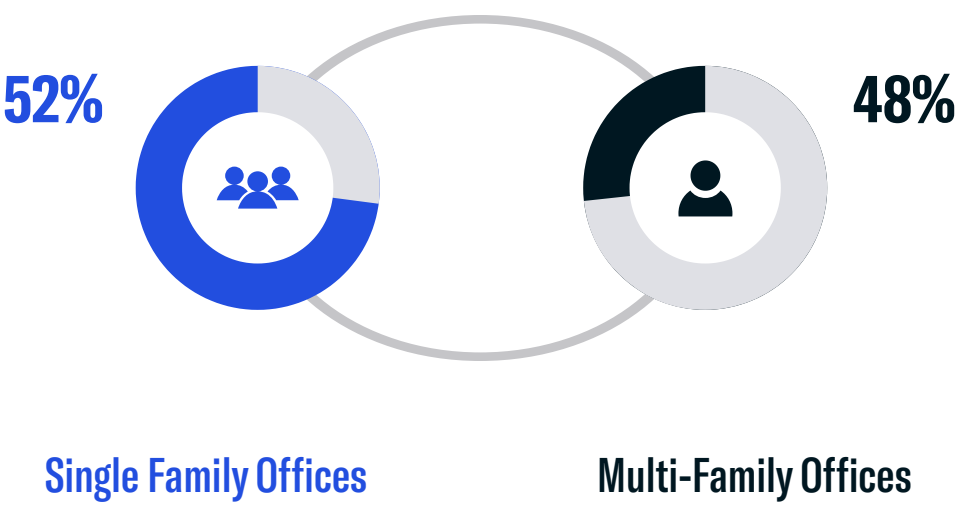


Updated Family Office Entities

Updated Family Offices & Family Office Contacts



Single Family Offices vs Multi-Family Offices



Registered Investment Advisor (RIA) Data Report: May 2023



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

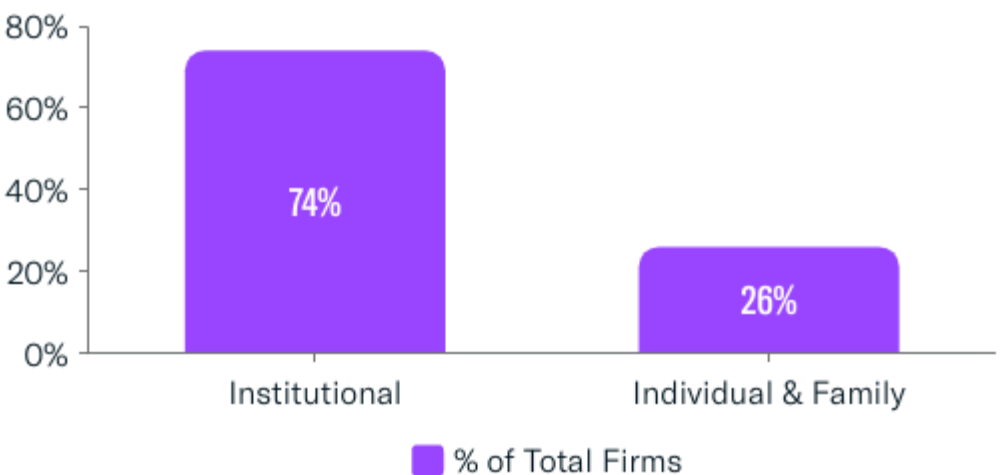
RIA Data Highlights

New Platform Additions for May

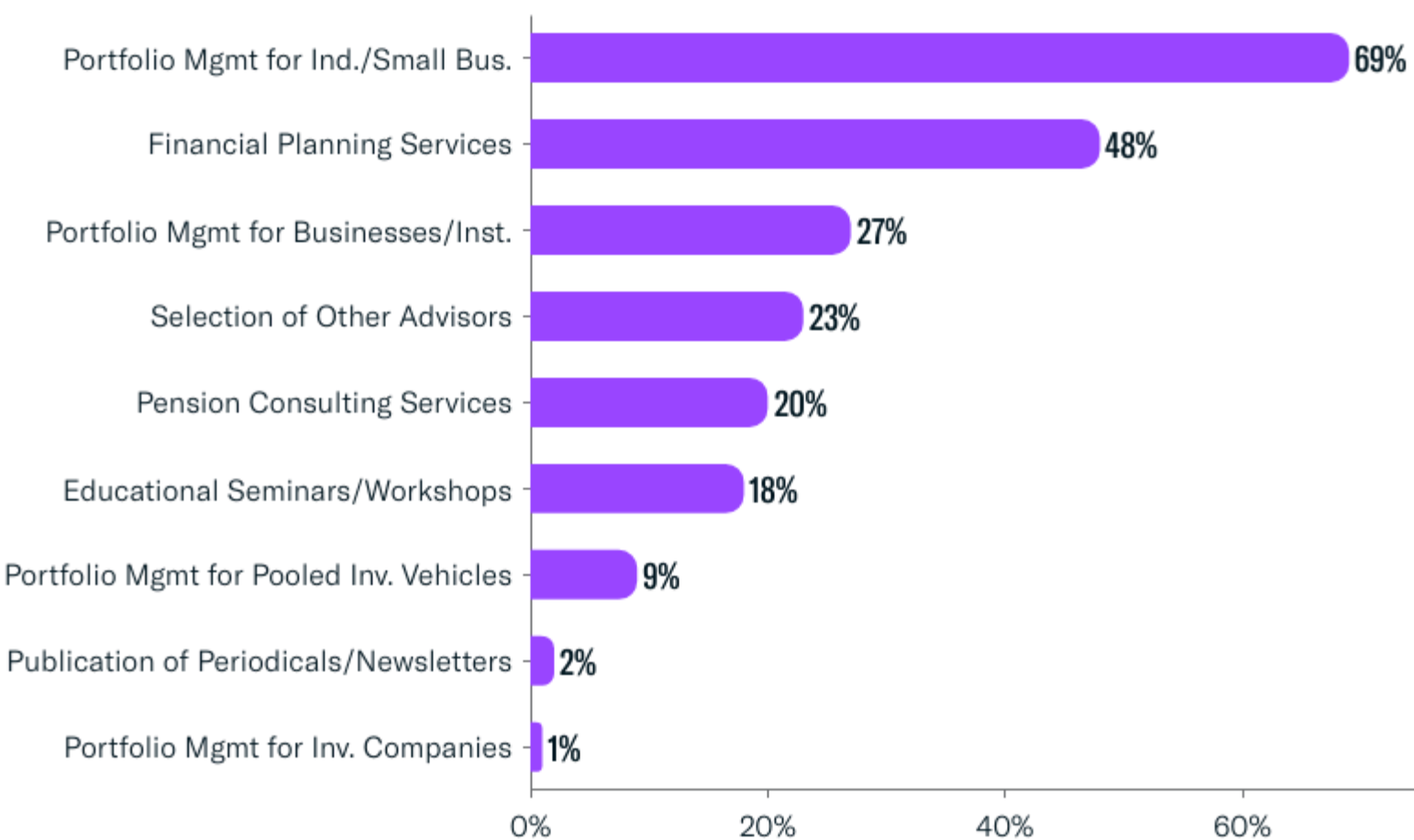
- Total Registered Entities (including Dually Registered): 169
- Total Registered Contacts: 3,700+
- Total Accounts: 690+
- Firms Using Alternatives: 124 or 73%
- Total AUM Added by New RIA Firms: \$18.69 Billion+

RIA Client Base Breakdown

The newly added RIA firms added to FINTRX in May reveal that 74% of their RIA clientele are institutional, while individual and family clients account for 26%.



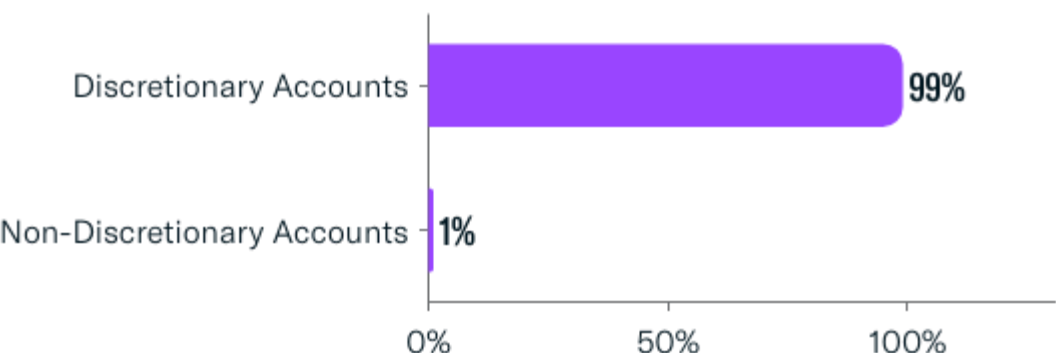
RIA Services Provided



Of the new RIA firms incorporated into the FINTRX dataset, 69% offer portfolio management for individuals and small businesses, while 48% provide financial planning services. It's important to note, RIA firms can and often have more than one service offered.

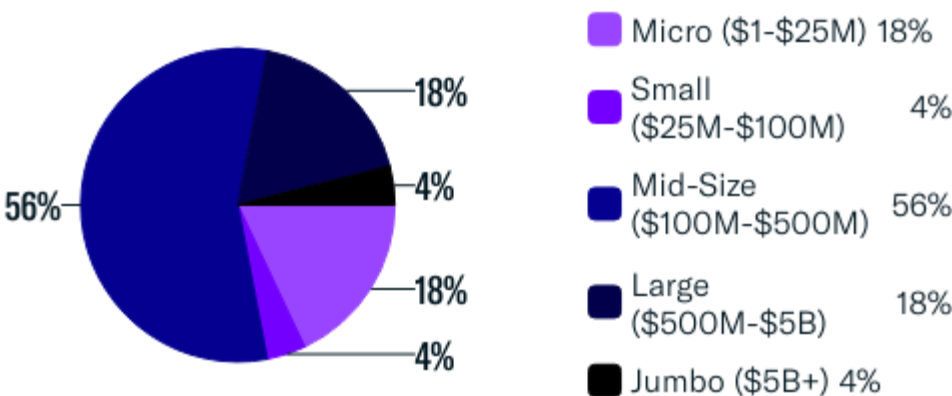
Accounts Breakdown

Discretionary vs Non-Discretionary Accounts Added



The [FINTRX RIA dataset](#) saw a significant addition of discretionary accounts to our dataset in May, making up 99% of new accounts added.

Firm Size by Assets Under Management

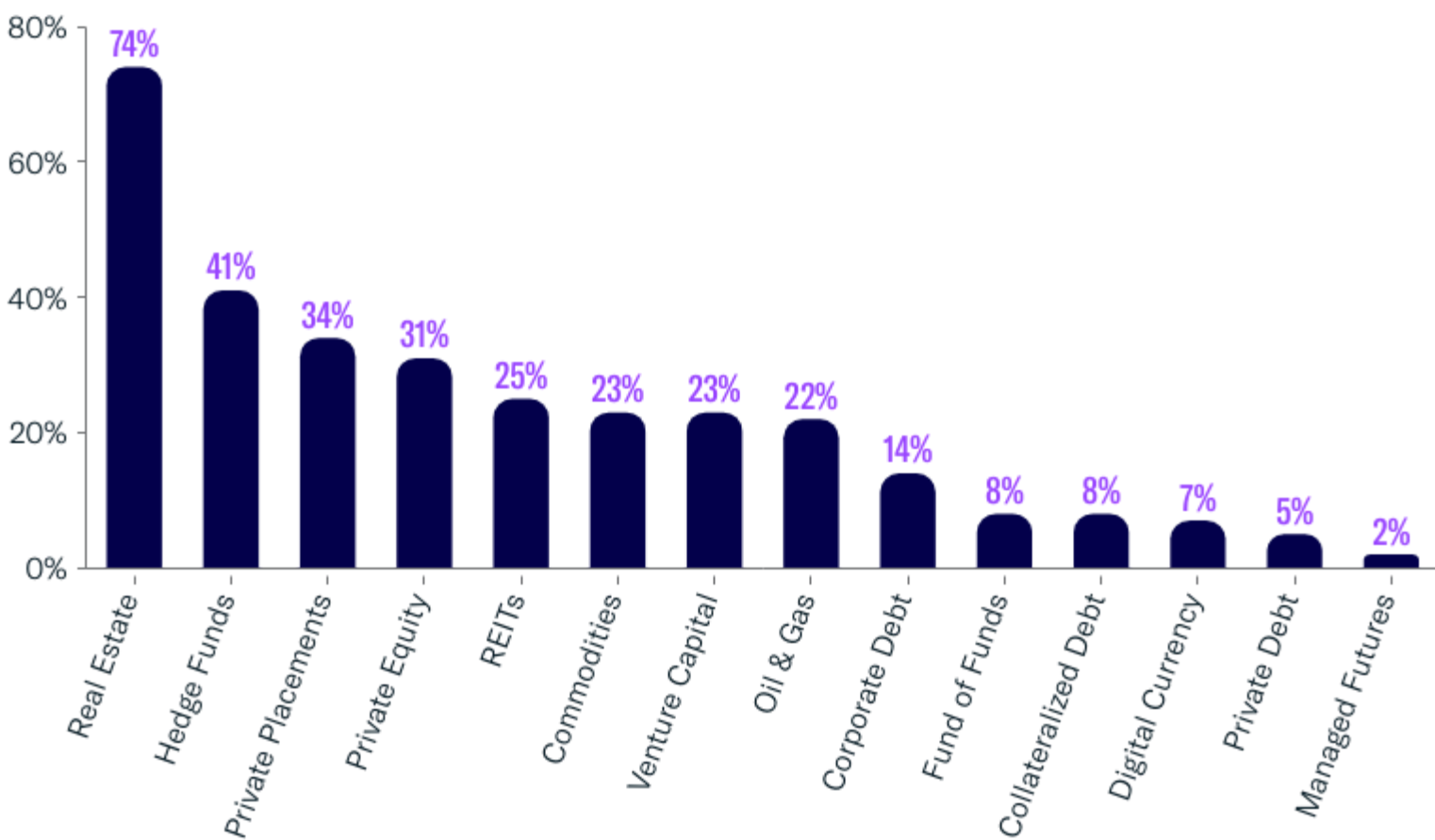


A majority (56%) of newly added RIA firms are considered 'Mid-Size' groups, with assets under management between \$100M and \$500M.

Alternative Investments Utilized

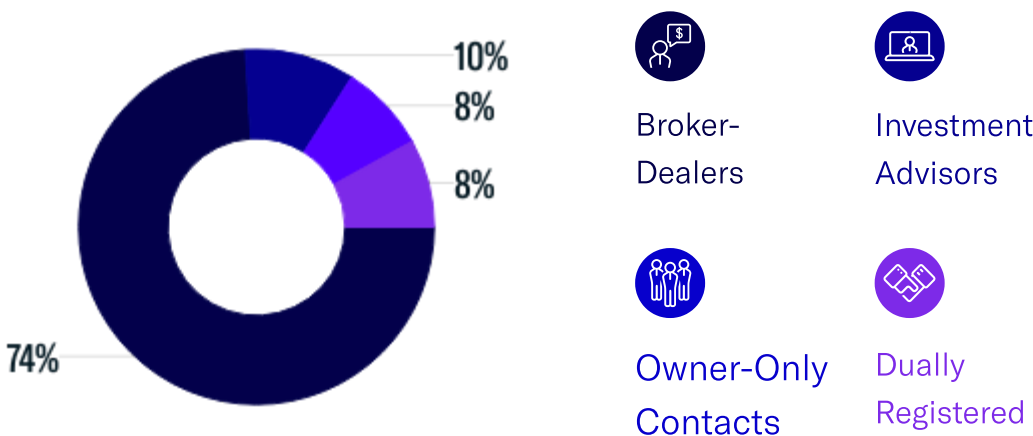
Firm Level

74% of newly added RIA firms displayed some allocation to real estate within their investment portfolios. A smaller fraction displayed interest in hedge funds, private placements and private equity, among a variety of other alternatives.



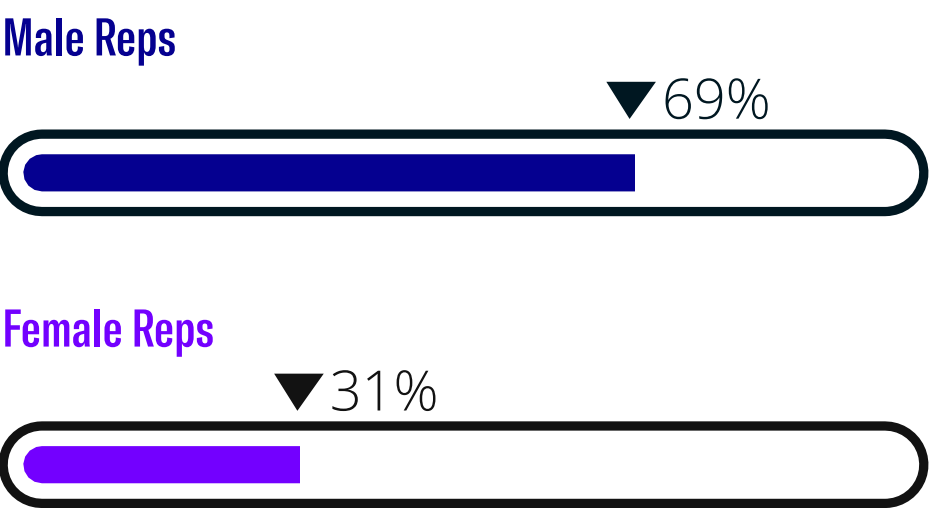
Contact Breakdown by Rep Type

A majority (74%) of newly added RIA representatives are registered as broker-dealers. Smaller segments included those registered as investment advisors at 10% while owner-only and dually registered contacts each made up 8% respectively.



Rep Gender Breakdown

Male vs Female Reps



About FINTRX

FINTRX is a unified data & research platform providing comprehensive data intelligence on **850,000+** family office & investment advisor records, each designed to help asset-raising professionals identify, access & map the global private wealth ecosystem.

FINTRX data intelligence covers **3,700+** family offices, nearly **20,000** family office contacts, **40,000+** registered investment advisor entities, and **746,000+** registered reps. Data is sourced from **10+** public & private sources. Equipped with **375+** search filters, FINTRX allows you to [seamlessly track](#) where family office & investment advisor capital is flowing, uncover allocation trends, break down investments by sector & size, understand future investment plans and more.

FINTRX provides in-depth dossiers on each family office & investment advisor, allowing asset-raising professionals to access AUM, source of wealth, investment criteria, past investments made, advisor growth signals, sectors & industries of interest and so much more.

While FINTRX is primarily designed to help asset managers and financial professionals, high-net-worth families, entrepreneurs and next-generation wealth owners can also benefit from our platform in a number of ways. [Streamline investor discovery & boost your capital-raising efforts today!](#)



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