

PRIVATE COMPANY

FINTRX Use Cases & Value Drivers for Capital-Raising Professionals

Use Cases

- + Leverage comprehensive wealth management data to [identify potential investors](#) for your company. Easily pinpoint firms making deals with companies that look like yours.
- + Analyze [direct investment activity](#) to pinpoint potential investors. Drill into past investments by date, sector, location, funding stage & company size as well as initial & follow-on investments.
- + Highlight firms active in specific sectors and deal types with [keyword searches & advanced filters](#).
- + Leverage [advanced relationship mapping and accurate contact information](#) to target relevant industry professionals more effectively.
- + Stay up-to-date on investment trends with [custom notifications and dynamic lists](#). Set transaction alerts to keep a pulse on investor activity.
- + Access [industry-specific news](#) with direct links to articles, filings and websites.
- + [Integrate FINTRX data directly into your existing workflows and tech stacks](#) to streamline deal sourcing and prospecting processes.

Value Drivers

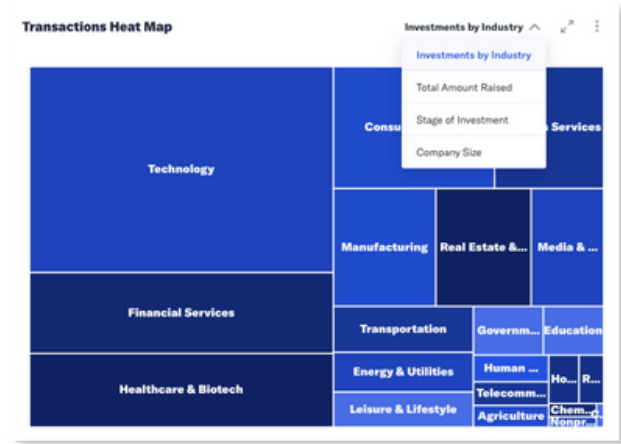
- + [Maximize value](#) by leveraging FINTRX insights for informed prospecting, securing early and late stage fundraising deals with confidence.
 - + [Increase deal success](#) by identifying target firms through investment strategies & preferences, as well as past direct transaction history.
 - + [Improve outreach efforts](#), easily identifying key contacts and decision-makers and leveraging relationship mapping and personalized details for warmer introduction opportunities.
 - + [Save time and effort](#) by utilizing AI-powered searching to automate research processes & drill down into thousands of investors in seconds.
 - + [Optimize efficiency](#) with insights into investment portfolios, AUM and past direct transactions to pinpoint ideal partners for successful deal execution. Utilize smart lists to manage your relationships, track communication history and ensure personalized engagement.
 - + [Enhance ROI](#) with actionable insights into active seed, Series A & late-stage investors, identifying ideal partners for your fundraising goals.
-

FINTRX Solves Critical Pain Points Such As...

- ✓ Sorting through thousands of firms & contacts instantly to find potential investors for any and all fundraising rounds
- ✓ Finding the right contacts for getting in the door and closing deals to meet your fundraising goals
- ✓ Having all the tools to prep for meetings at your fingertips
- ✓ Accessing prospecting & deal management in one unified platform
- ✓ Facilitating easy and efficient team-wide organization and communication

Easily Identify Investors for All Fundraising Rounds

Pinpoint potential investors by AUM, location and past transactions. Highlight firms actively making investments into companies similar to yours.



Company Transactions

Investments: 2,234 | Private Companies: 19,974 | Transactions: 27,919 | Follow-On Investments: 4,985

Search about transactions... | Create Transaction Alert | Filter

Date	Investor	Company	Stage	Size Of Round	Sector	Industry	Country
Nov 2024	Brooks Woodcroft International	CashFlow Planner	Undisclosed	Undisclosed	Financial Services	Financial Services, Investment ...	United Kingdom
Nov 2024	Isaac Group Family Office	Progenity2	Series D	\$ 20,000,000	Healthcare & Life Sciences	Equipment, Healthcare, Technology	United States
Nov 2024	Highbridge Venture (Overseas Family Offi...	Envision Education	Series D	\$ 30,000,000	Education & Human Services	Education	New Zealand
Nov 2024	Bessemer Venture Partners (BVP)	Adara AI	Seed	\$ 5,000,000	Technology	Artificial Intelligence, Software	United States
Nov 2024	Waverly Advisors	Master Financial Solutions	Acquisition	Undisclosed	Financial Services	Investment Management	United States
Nov 2024	Bessemer Venture Partners (BVP)	Physical Intelligence	Series C	\$ 40,000,000	Technology	Artificial Intelligence, Robotics	United States
Nov 2024	Worleyparsons & Co. (Cash & Debt)	SWILL	Series C	\$ 10,000,000	Real Estate & Construction	Real Estate, Software, Technology	Australia
Nov 2024	Core Capital (Wick Family Office)	Vivacity	Series C	\$ 4,000,000	Financial Services	Financial Services, Financial Technology ...	United Kingdom
Nov 2024	The Colony Group	SP Financial Services	Acquisition	Undisclosed	Financial Services	Financial Services, Investment ...	United States
Oct 2024	Life Sciences Family Office	Philo River Wealth Advisors	Acquisition	Undisclosed	Financial Services	Investment Management	United States
Oct 2024	Rock Ventures (Overseas Family Offi...	Fluor	Series C	\$ 4,000,000	Real Estate & Construction	Data, Real Estate, Software	United States

Utilize the direct transactions module to explore 27,000+ early and late stage investments and analyze investor preferences based on sector, funding stage, round size and funded company information.

Make Warmer Connections With Key Prospects

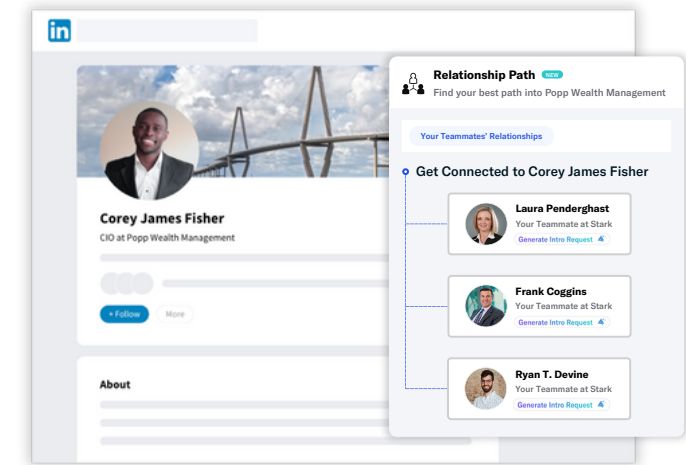
Leverage your network for warmer introduction opportunities.

Photography

Cooking

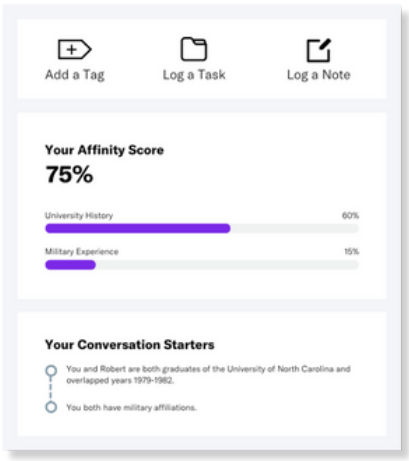
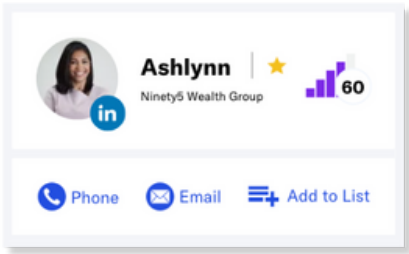
Fishing

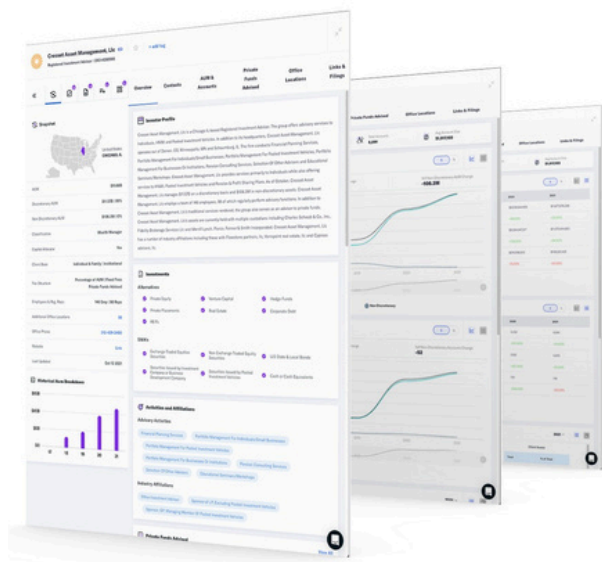
Craft more effective sales pitches with custom conversation starters & personal details such as hobbies, university background or board affiliations.



Find your best path into any firm or contact with Relationship Path.

Utilize Affinity relatability scoring for a more targeted approach.





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

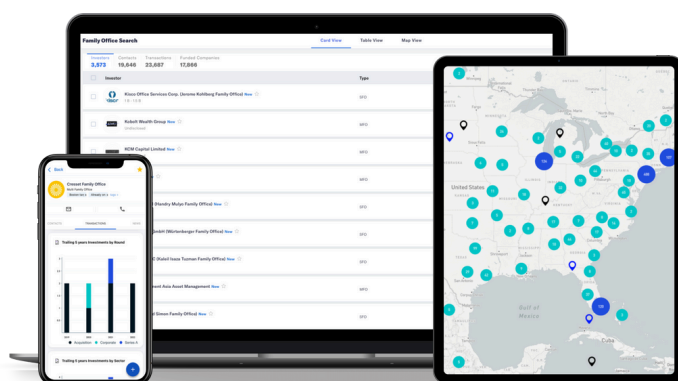
\$115 Trillion+

Managed Assets Tracked

600K+

Email Addresses of Decision-Makers

BOOK A DEMO



Join the thousands of capital-raising professionals who trust our unparalleled data and efficient prospect management tools to source deal partners and build effective industry relationships...



Email us:
sales@fintrx.com



Call us:
(617) 517-0789



Visit us:
fintrx.com