

PRIVATE COMPANY

FINTRX Use Cases & Value Drivers for Capital-Raising Professionals

Use-Cases

- Leverage comprehensive private wealth data to [identify potential investors](#) for your company.
- Get investor insights with [comprehensive direct investment data](#). Drill into past investments by date, sector, location, funding stage, size of funding round and company size as well as [initial & follow-on investments](#).
- Leverage your [personal network and relatability scoring](#) to target industry professionals more effectively and efficiently.
- Access [accurate contact information](#) for key decision-makers and prep for your meetings with insights into [education & work backgrounds](#) as well as [hobbies, interests and affiliations](#).
- Stay informed about current investment activity and market trends through the [News Portal](#) with [direct links](#) to articles and firm profiles.
- Utilize the [custom smart lists](#) and [dynamic mapping features](#) to streamline your prospecting and stay up-to-date on contact & firm changes.
- [Integrate FINTRX data with existing workflows](#) and systems using the [API data feed](#) to enhance deal sourcing and monitoring processes.

Value-Drivers

- [Maximize value](#) by leveraging FINTRX insights for informed prospecting, securing seed to Series A fundraising deals & beyond with confidence.
- [Increase deal success](#) by identifying target firms through investment strategies & preferences, as well as past direct transaction history.
- [Enhance ROI](#) with actionable insights into active seed, Series A, Series B and late-stage investors with insights into investment sectors and follow-on investment interest.
- [Save time & effort](#) by utilizing accurate contact information and direct links, facilitating efficient outreach and relationship building.
- [Optimize efficiency](#) by analyzing firm AUM and investment preferences to pinpoint ideal partners for successful deal execution.
- [Streamline prospecting](#) by utilizing smart lists and dynamic mapping to build & manage relationships with key contacts, track communication history and ensure personalized engagement.
- [Boost deal success](#) by identifying key contacts and decision-makers with ease, and leveraging network connections for warmer introduction opportunities.

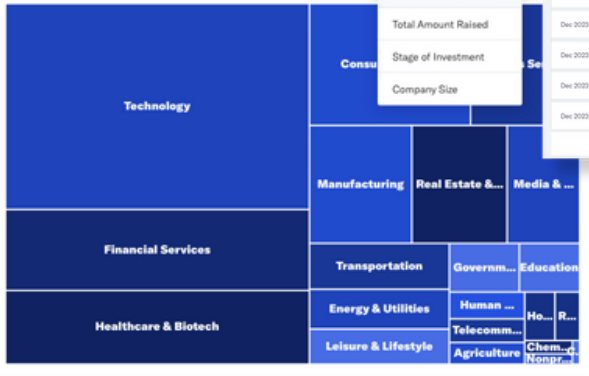
FINTRX Solves Critical Pain Points Such As...

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

Instantly Identify Investors for All Fundraising Rounds

Pinpoint potential investors by total AUM, location, past investment history and more.

Transactions Heat Map



Direct Transactions

Table View Heat Map Map View

Investors: 2,109 Private Companies: 20,052 Transactions: 26,901 Follow-On Investments: 4,690

Search direct transactions... Create Transaction Alert Filter

Date	Investor	Company	Stage	Size Of Round	Sector	Industry	Country
Dec 2023	DL Family Office	Chain of Demand	Acquisition	\$10,000,000	Consumer Goods, Financial...	Data, Financial, Technology...	Hong Kong
Dec 2023	Fremont Private Holdings (Becht...	Master Truck	Acquisition	Undisclosed	Energy & Utilities, Transportation	Oil & Gas, Transportation	United States
Dec 2023	Morgan Creek Capital Managem...	Nenco	Seed	\$10,000,000	Financial Services	Blockchain, Cryptocurrency...	United States
Dec 2023	CapTrust Family Office	Yudina Financial	Acquisition	Undisclosed	Financial Services	Financial Services...	United States
Dec 2023	Peterson Partners (Joel Peterson...	MindSmith	Pre-Seed	\$500,000	Education, Technology	Education, Software...	United States
Dec 2023	The Less Group (Beck Outlines...	Emergent Cold LatAm	Private Equity	\$500,000,000	Transportation	Logistics, Storage	Brazil
Dec 2023	Breyer Capital (Jim Breyer Famil...	Babyfon	Venture	\$18,000,000	Financial Services, Government	Blockchain, Security	United States
Dec 2023	Emerging Capital Family Office (S...	Mint	Series B	\$20,000,000	Government, Technology	Internet Of Things, Security	Sweden

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

Leverage Comprehensive Contact Profiles

Potential Associates

Former Colleagues Former Classmates

Contact	Network	Current Entity	Relationship Score	Association
Cian Assistant Vice President		Wilshire Advisors Llc	100%	Centerbury Consulting Incorporated, Newport Beach CA (18 - 19)
Luke Financial Planner		Charles Schwab & Co., Inc.	100%	California Lutheran (13 - 15)
Keegan Marketing Manager		Filice Retirement Services	80%	California Lutheran (13 - 15)
Joseph Client Associate		Morgan Stanley	80%	California Lutheran (13 - 15)
Connor Financial Planner		Creative Planning	80%	California Lutheran (13 - 15)
Legan Financial Advisor		Forum Financial Management, Lp	80%	California Lutheran (13 - 15)
Jeffrey Registered Client Service Associate		Raymond James & Associates, Inc.	80%	California Lutheran (13 - 15)

Leverage your network for warmer introduction opportunities.

Photography

Cooking

Fishing

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

Utilize Affinity relatability scoring for a more targeted approach.

Access accurate direct contact information and LinkedIn profiles.

Add a Tag Log a Task Log a Note

Your Affinity Score
75%

University History 60%
Military Experience 15%

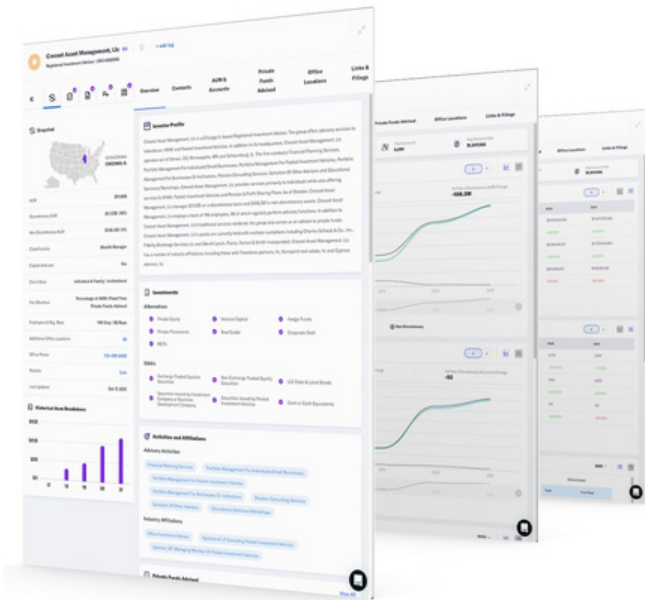
Your Conversation Starters

- You and Robert are both graduates of the University of North Carolina and overlapped years 1979-1982.
- You both have military affiliations.

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+

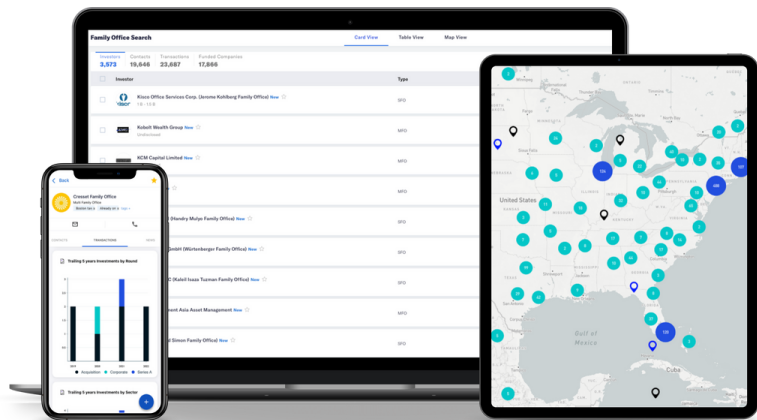
Family Office Records

\$115 Trillion+

Managed Assets Tracked

600K

Email Addresses of Key Investment Professionals



Join the thousands of capital-raising professionals who trust our unparalleled data & savvy prospect management tools to source investors and build effective relationships...

Email us:
sales@fintrx.com

DEMO Book a demo:
Here

Call us:
(617) 517 - 0789

Visit us:
fintrx.com