CASE STUDY | 2025

How Great Gray Enhances Advisor Prospecting with FINTRX

About Great Gray Trust Company

Great Gray Trust Company specializes in Collective Investment Trusts (CITs), providing fiduciary oversight, governance, and operational support for asset managers, advisors, and plan sponsors. The team oversees $209.8 billion in assets, partnering with 84 sub-advisors, 37 platforms, and 200+ recordkeepers to streamline retirement investments.

Committed to efficiency, transparency, and technology-driven solutions, Great Gray empowers plan sponsors, advisors, and asset managers to navigate the market with confidence.

GREAT GRAY
TRUST COMPANY

"My experience with FINTRX has been great—streamlined and efficient! The AI Analyst feature has been a game-changer, providing powerful talking points, email templates, and scripts that have completely transformed our approach to advisor prospecting."

Darryn Bolden
Qualified Plan Strategist

Challenges

Great Gray faced a major hurdle in their day-to-day operations: inconsistent advisor data. Finding accurate information on advisors and their firms was a time-consuming and inefficient process, making it difficult to prepare effectively for outreach and build meaningful connections. The team at Great Gray needed a smarter, more automated solution to **accelerate advisor identification** and optimize outreach effectiveness.

- **Inconsistent and fragmented advisor data**
- **Lack of personalized insights led to weak outreach**
- **Manual processes resulted in inefficient prospecting workflows**

Solution

Great Gray now leverages **FINTRX's AI Analyst** to streamline their advisor research process, integrating real-time insights directly into their workflow. This allows them to quickly identify key prospects and personalize outreach with AI-powered data, ensuring more efficient and impactful engagements.

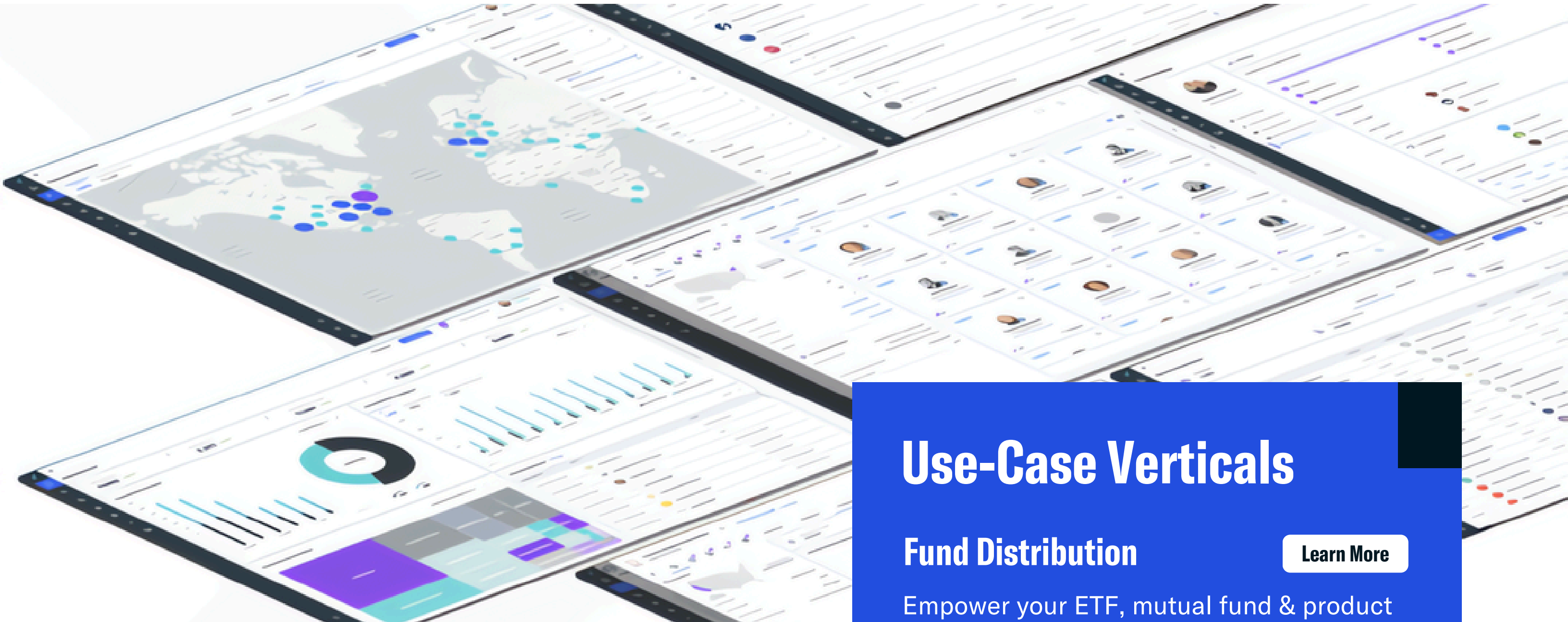
Results & Key Benefits

The impact of FINTRX was immediate and transformative. With streamlined workflows and access to high-quality, structured data, Great Gray Trust Company significantly improved its prospecting efforts.

- **Enhanced Advisor Targeting – With actionable, real-time data, Great Grey identifies and engages with the right advisors faster and more effectively.**
- **Improved Prospect Engagement – The ability to leverage personalized talking points & AI-driven email scripts led to more meaningful conversations and increased responsiveness.**
- **Greater Efficiency & Productivity – AI automation reduced the time spent on research and manual data entry, allowing Darryn to focus on strategic initiatives rather than administrative tasks.**
- **Seamless Integration: By pulling advisor insights directly from Salesforce call lists, FINTRX streamlines the workflow, eliminating the need for multiple data sources & manual searches.**

FINTRX

About FINTRX



AI-Powered Data Intelligence on Family Offices, RIAs, Broker-Dealers, Wealth Teams and E&Fs

FINTRX is the leading private wealth intelligence platform, offering the industry's most expansive and up-to-date data on family offices, investment advisors, broker-dealers, and wealth teams.

Powered by industry-leading AI, FINTRX turns data into actionable intelligence, helping firms distribute funds, raise capital, and identify advisor M&A and recruiting targets - all designed to drive strategic growth.

REQUEST A DEMO

Use-Case Verticals

Fund Distribution

Learn More

Empower your ETF, mutual fund & product distribution efforts with actionable insights tailored to your goals. Uncover trends, analyze holdings, optimize your distribution strategies & identify key market opportunities.

Asset Raising

Learn More

Target the right investors, personalize outreach & accelerate capital-raising with comprehensive data on 4,000+ family offices, including investment preferences, direct investment activity & key decision-makers.

Advisor Recruiting & M&A

Learn More

Identify high-potential advisor teams, assess recruitment opportunities & craft strategic pitches. Perfect for targeting wirehouse teams, independent RIAs, or wealth management entities with data-driven insights to enhance your recruiting & acquisition efforts.