FINTRX

CUSTOMER CASE STUDY

Merit Financial Advisors

Wealth Management | Financial Services

Merit Financial Advisors is a national wealth management firm that currently manages over $11.8 billion in client assets. They support both independent broker dealer-affiliated advisors and independent RIAs, aiming to revolutionize the client experience & build the 'RIA of the future'. By providing advanced technology, operational support, and investment expertise, the team at Merit aims to build a growth-focused enterprise offering superior investing and planning solutions for generations to come.

Their Challenge

Merit Financial Advisors, a forward-thinking wealth management firm, faced significant challenges in accessing detailed company data for their growth and marketing initiatives. They needed an efficient way to identify wealth management firms that aligned with their goals, and gathering this information manually was time-consuming and hindered their ability to effectively educate advisory firms on value enhancement and client service strategies.

"We're always on the lookout for wealth management firms that align with our goals, whether they're aiming for growth, needing more business resources, or planning for succession," says Jooliana Krummel of Merit Financial Advisors. *"The challenge we faced was that we didn't have easy access to the detailed company data we needed, and gathering it ourselves was taking up too much time. . . We also needed a solid list of prospects for our B2B marketing efforts to help educate advisory firms on how to increase their value, develop strategies for better serving their clients, and so on."*

The Outcome

After extensive research on potential service providers in the financial space, Merit Financial Advisors made the decision to partner with FINTRX. They were drawn to FINTRX's commitment to continuous improvement, mirroring Merit's own 'Kaizen' philosophy. The platform's advanced features, including AI-powered functionality, simplified data segmentation and list building, direct LinkedIn integration for automated introductions, and comprehensive firm and contact data, perfectly aligned with the team's needs.

"We wanted a partner that shares our values—one that is forward-thinking and consistently reinvesting in its technology," explains Krummel. *"FINTRX's commitment to implementing AI, their user-friendly interface, and native Salesforce integration made them stand out from the competition."*

Integrating FINTRX into their everyday workflow has transformed Merit Financial Advisors' B2B marketing efforts. The platform's innovative features and detail-rich data have significantly improved efficiency and data management across the team. With FINTRX, Merit Financial Advisors has found a true partner in their mission to provide superior wealth management services and drive continuous improvement in their industry.

"FINTRX has been a real asset for us. It's made our B2B marketing process smoother and more efficient, thanks to the native Salesforce integration and powerful list-building features. The AI helps us quickly find the right information, even when we're not sure what to look for. Plus, the detailed firm and advisor data keeps us aligned with our strategic goals."

"[FINTRX has] been a game-changer for our team."

Jooliana Krummel

Director of Strategic Partnerships
Merit Financial Advisors

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About FINTRX

FINTRX is a unified data and research platform, offering extensive data intelligence on 850,000+ wealth management firm & contact records, designed to enhance industry professionals' ability to access, map and engage with the global wealth management ecosystem.

With an extensive database of 4,100+ family offices, 23,000+ family office contacts, 40,000+ registered wealth management firms and 750,000+ reps and associated contacts, the FINTRX data intelligence solution offers unparalleled access to accurate & actionable information on the wealth management space. Equipped with 375+ search filters, FINTRX allows you to seamlessly track the flow of private capital, uncover allocation trends and break down investment data. Our mission is to empower financial professionals by equipping them with the tools and insights needed to effectively engage and connect with relevant prospects across the industry.

FINTRX goes beyond basic contact details, providing in-depth profiles that include investment preferences, asset allocations, historical investment activity and so much more. This allows users to target the most relevant prospects based on specific criteria such as investment strategies, office locations and asset class preferences.

At FINTRX, we remain committed to providing exceptional customer support and ensuring our users have the resources they need to succeed. Join us & experience the transformative power of FINTRX. Together, we can navigate the complexities of the private wealth market and unlock new opportunities for growth and success.

For further insight on how FINTRX can streamline capital raising and product distribution efforts, request a demo below.

Schedule Demo

New Platform Tools & Enhancements

Proprietary Wealth Teams Dataset

Access data covering over 25,000 wealth teams and 100,000+ associated reps within wirehouses & independent RIA aggregators.

AI-Powered Search

Experience a new level of search efficiency that understands & processes your natural language queries, delivering relevant firm and contact data in seconds.

FINTRX 360° LinkedIn Integration

Enrich your LinkedIn experience with the power of FINTRX 360°. Boost networking, build valuable connections, and drive business growth.

Advisor Movement and M&A Activity Tracking

Keep tabs on registered rep industry movements, breakaway advisors, & new wealth management teams.

Advisor ETF & Equity Portfolio Insights

Leverage detailed insights on ETF portfolios including asset classes, management styles and more to uncover key sales opportunities.