

**FINTRX**

**April 2024**

**Family Office & Registered Investment Advisor  
Data Report**

MONTHLY PRIVATE WEALTH DATA REPORT



[www.fintrx.com](http://www.fintrx.com)

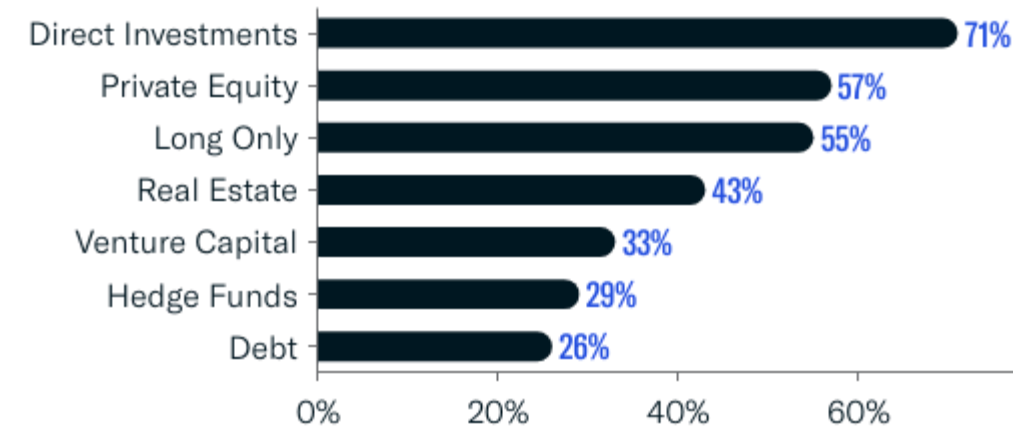
# Family Office Data Report: April 2024

Data: [FINTRX Family Office Database](#)

## Family Office Platform Updates & Additions

- New Family Offices: 40+
- New Family Office Contacts: 670+
- Total Family Office Additions: 830+
- Total Updated Family Office Entities: 3,400+
- Newly Tracked Family Office Investments: 120+
- New Family Office Data Points: 7,400+
- Total Family Office Assets Added: \$69.3 Billion+

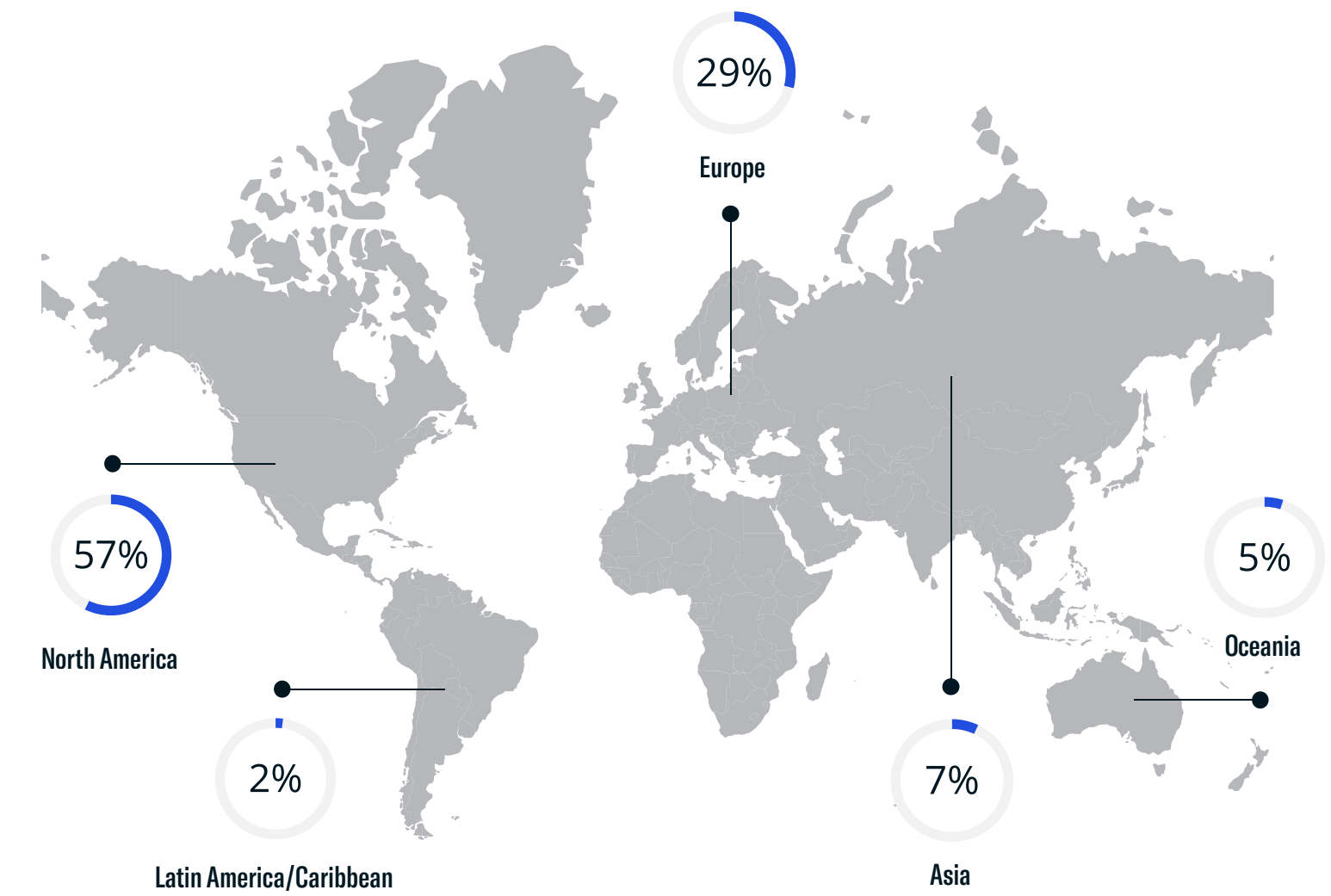
## Asset Class Interest Breakdown



FINTRX continued to see a majority of firms (71%) allocating via direct investments into private companies. Other prominent asset classes include private equity, long only equities and real estate.

## Family Office Geographical Breakdown

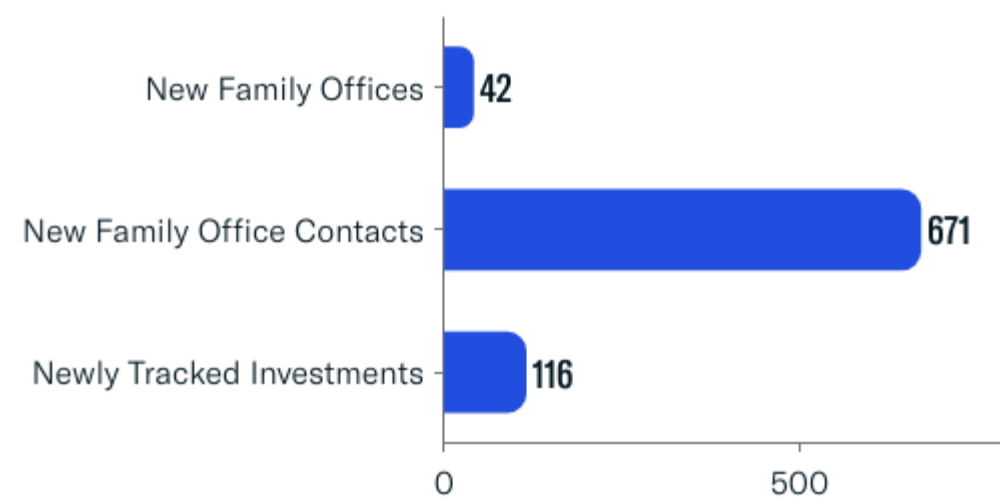
Regions with New Family Office Activity



The majority of family offices added to the FINTRX family office dataset in April are headquartered in North America, accounting for 57% of firms, while European offices account for roughly 29%.

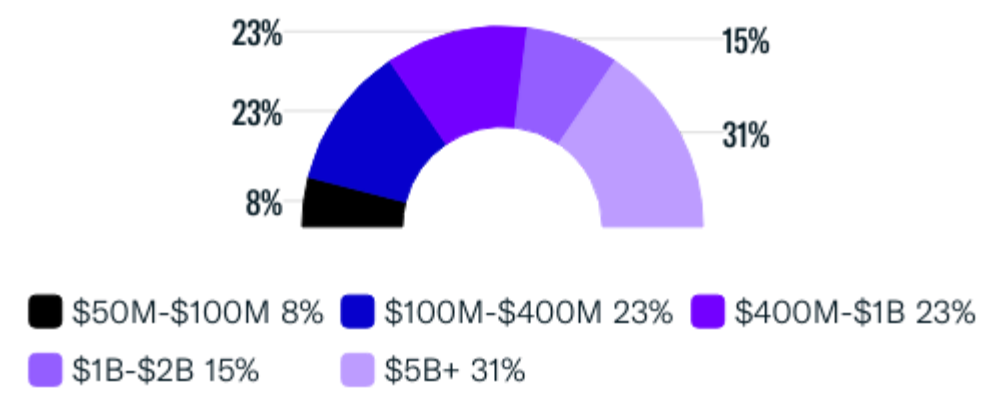
## Family Office Platform Additions

Newly Added Family Offices, Family Office Contacts & Tracked Investments



## Assets Under Management (AUM)

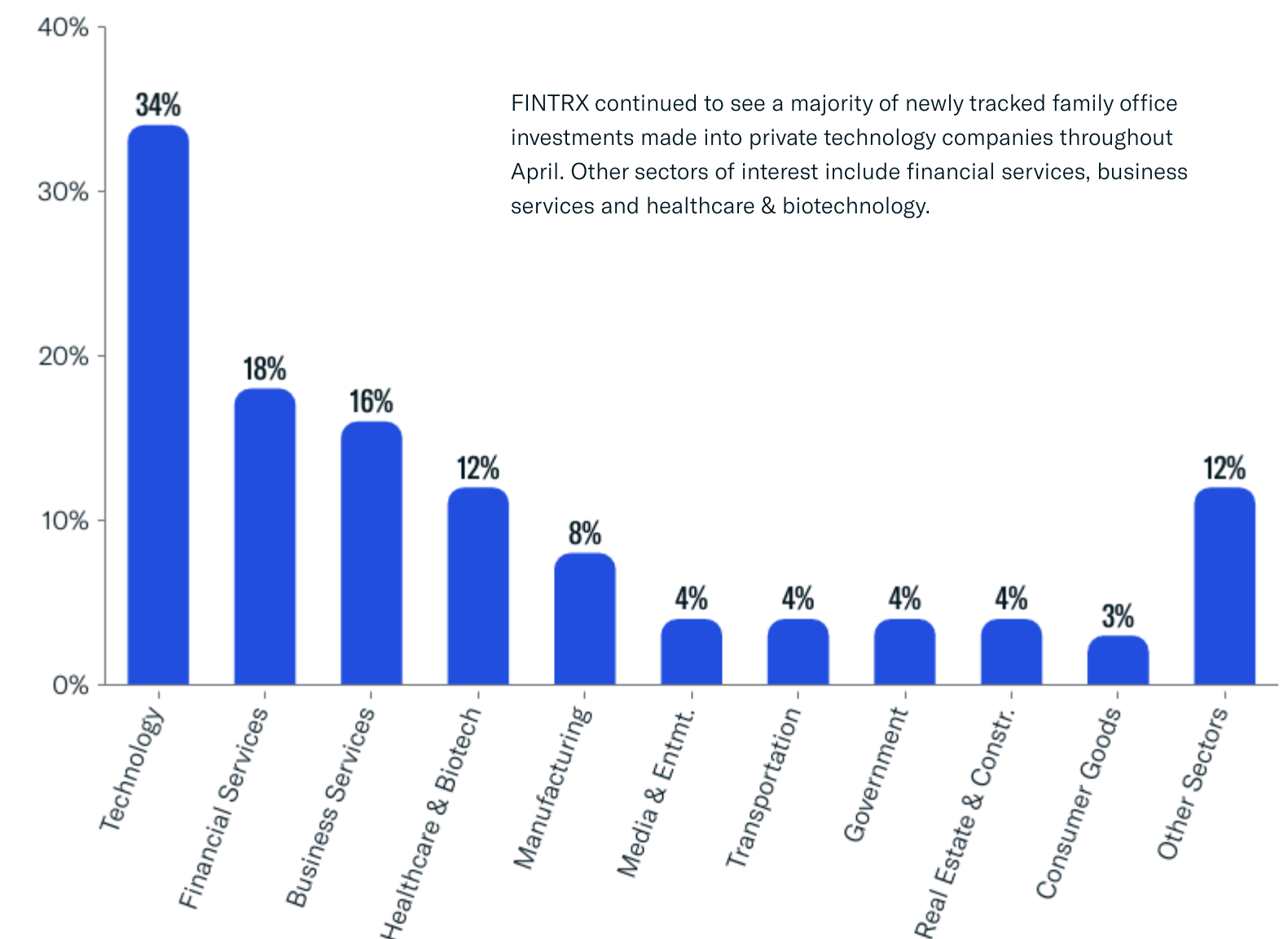
Newly Added Family Offices that Disclosed their AUM



FINTRX data revealed that the majority of family offices added in April oversee client assets exceeding \$5 billion.

## Newly Tracked Family Office Investments

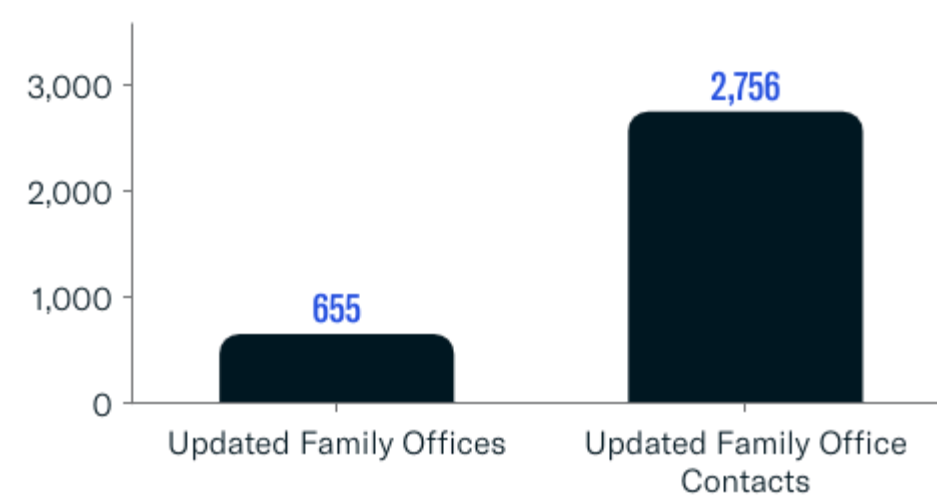
Top 10 Sectors of Interest



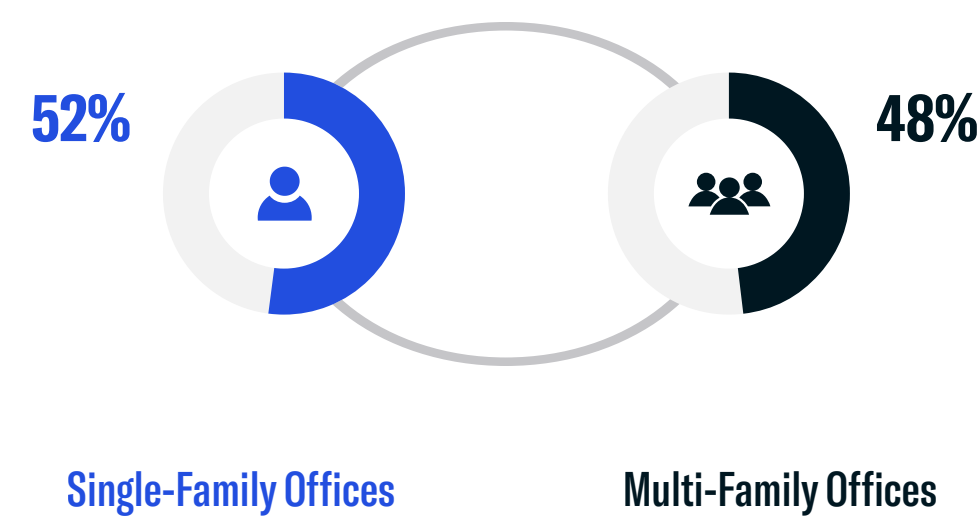
FINTRX continued to see a majority of newly tracked family office investments made into private technology companies throughout April. Other sectors of interest include financial services, business services and healthcare & biotechnology.

## Updated Family Office Entities

Updated Family Offices & Family Office Contacts



## Single-Family Offices vs Multi-Family Offices



# Registered Investment Advisor (RIA) Data Report: April 2024



Data: [FINTRX Registered Investment Advisor \(RIA\) Database](#)

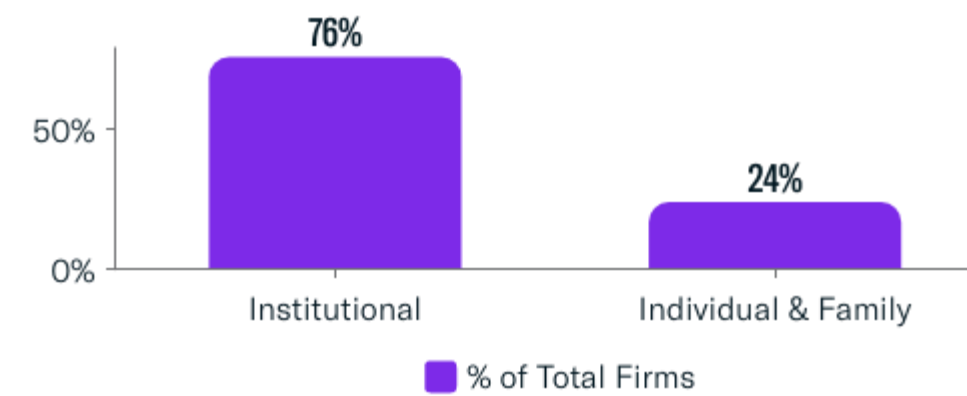
## RIA Data Highlights

New Platform Additions for April

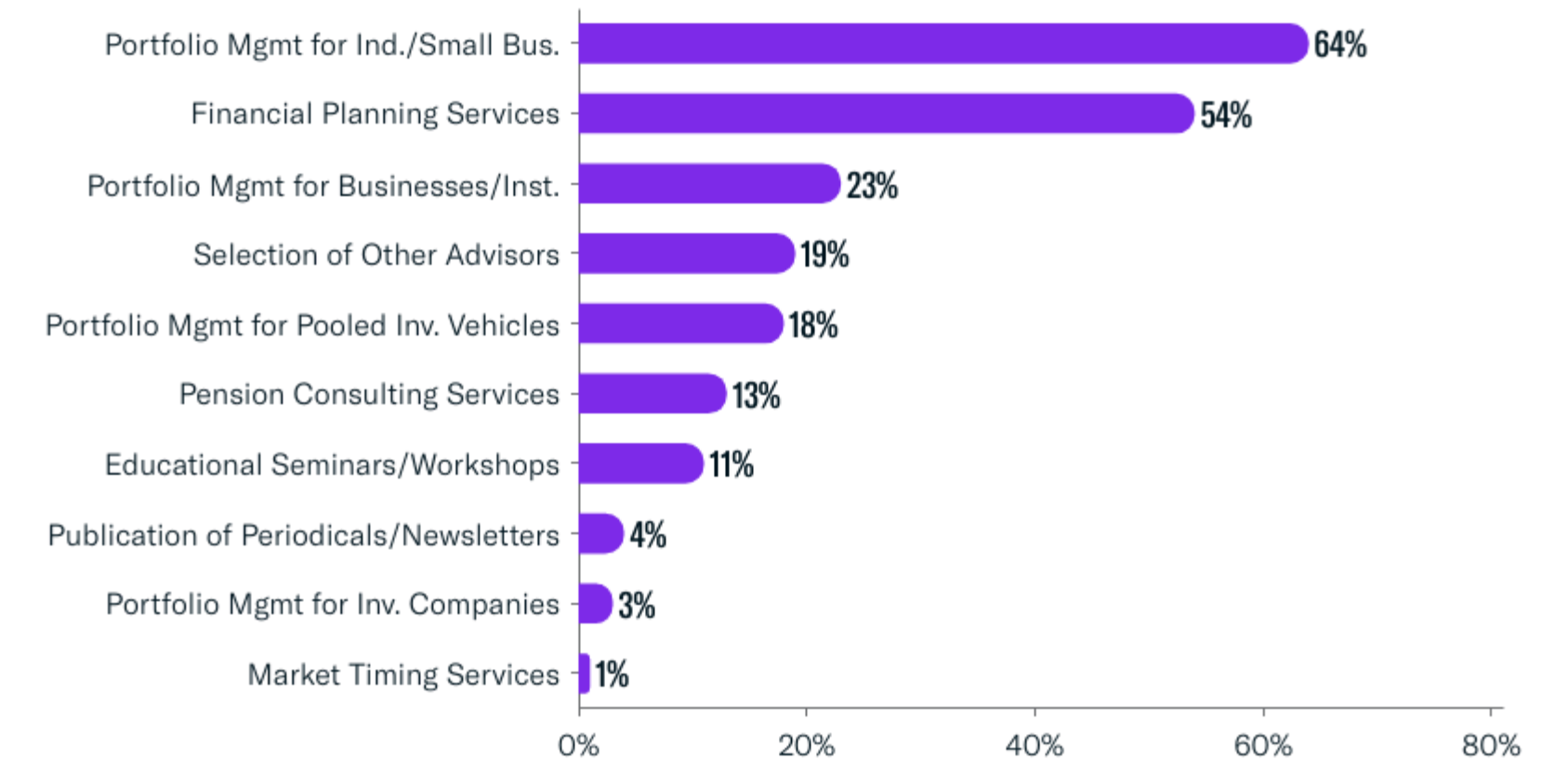
- Total Registered Entities (including Dually Registered): 182
- Total Registered Contacts: 5,130+
- Total Accounts: 1,090
- Firms Using Alternatives: 75%
- Total AUM Added by New Firms: \$14.9 Billion+

## RIA Client Base Breakdown

The April RIA additions revealed that 76% of their client base consists of institutional clients, while individual and family clients make up just 24%. This highlights the strong institutional focus of these RIA firms, showcasing their expertise and dedication in serving this segment of the market.



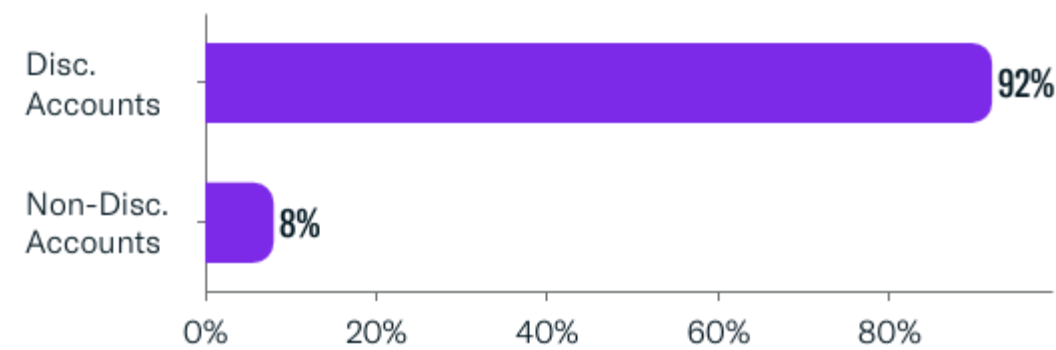
## RIA Services Provided



The top RIA service remains portfolio management for individuals and small businesses, comprising 64% of new firms. Financial planning services followed at 54%. Other prominent RIA services, each representing 23% or less, include the selection of other advisors, portfolio management for businesses and institutions, and portfolio management for pooled investment vehicles, among others. It's worth noting that RIA firms commonly provide multiple services to their clientele.

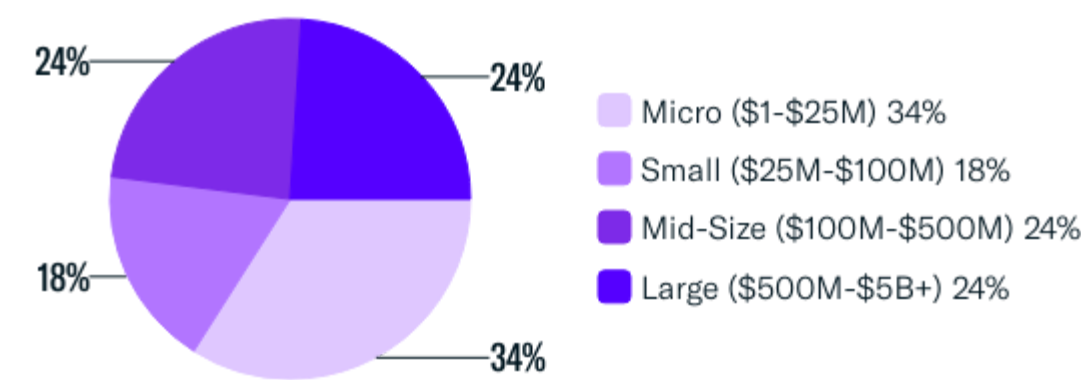
## Accounts Breakdown

Discretionary vs Non-Discretionary Accounts Added



FINTRX RIA data saw a significant addition of discretionary accounts to our dataset in April, making up 92% of new accounts added.

## Firm Size by Assets Under Management

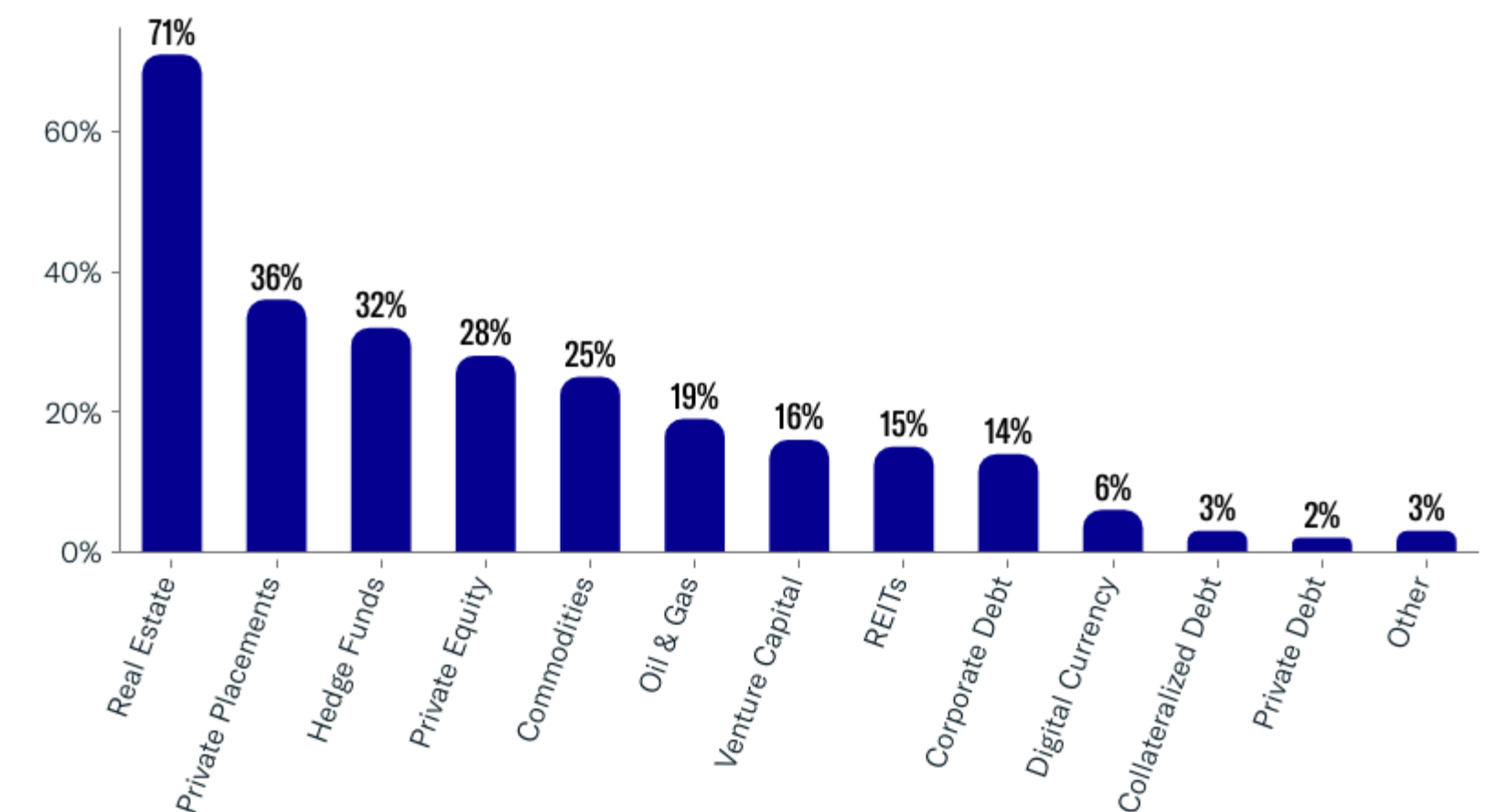


Most (34%) of the new RIA firms added to the FINTRX RIA dataset fall under the 'micro' category, managing between \$1 and \$25 million in client assets.

## Alternative Investments Utilized

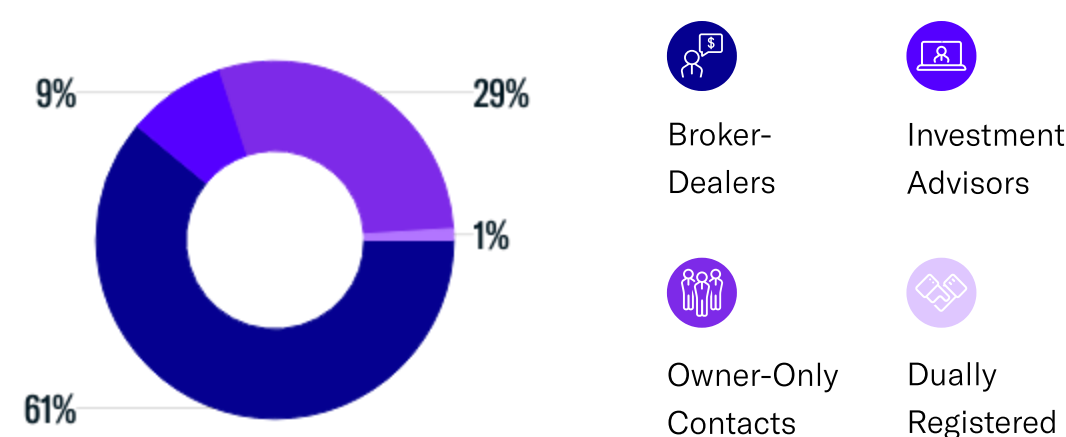
Firm Level

71% of newly-added RIA firms displayed some allocation to real estate within their investment portfolios. Smaller fractions displayed interest in private placements, hedge funds, private equity and commodities, among various others.



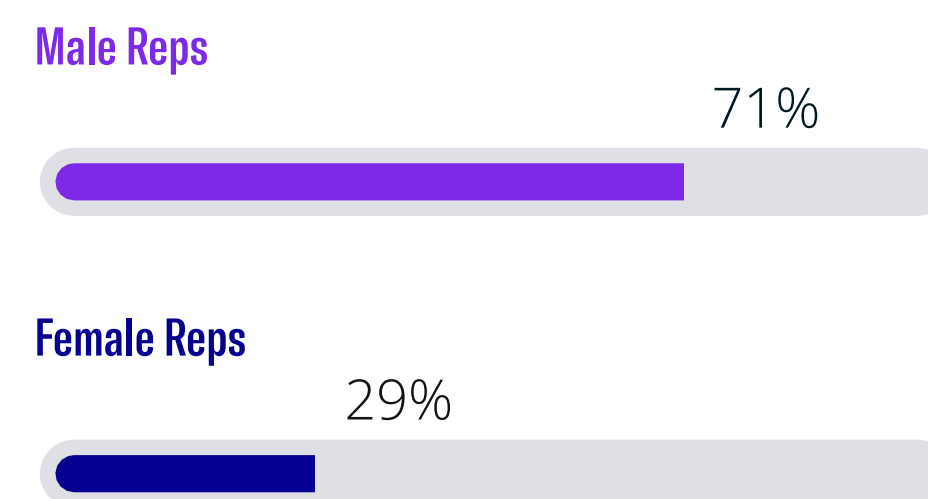
## Contact Breakdown by Rep Type

Of the newly added RIA reps, the majority (61%) have registered as broker-dealers, while 29% registered as investment advisors. Just 9% are designated as owner-only representatives and a mere 1% fall under the dually registered category.



## 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.

The FINTRX platform combines data, analytics and intuitive software to help clients identify investment opportunities, connect with investors and stay informed on industry developments.

FINTRX is designed to be user-friendly, with a variety of features including custom list building, news alerts and notifications, real-time updates and customizable reporting options. Additionally, new AI-powered features such as [natural language search capabilities](#) and [advanced relationship intelligence](#) empower users to leverage the most accurate and relevant family office and investment advisor data to prospect more efficiently, book more meetings and close more deals.

Our mission is to empower financial professionals by equipping them with the tools and insights needed to effectively engage and connect with potential investors.

---

**Streamline investor discovery & boost your capital-raising efforts today!**

[→ Schedule a Demo](#)

