FINTRX

FINANCIAL DATA INTELLIGENCE

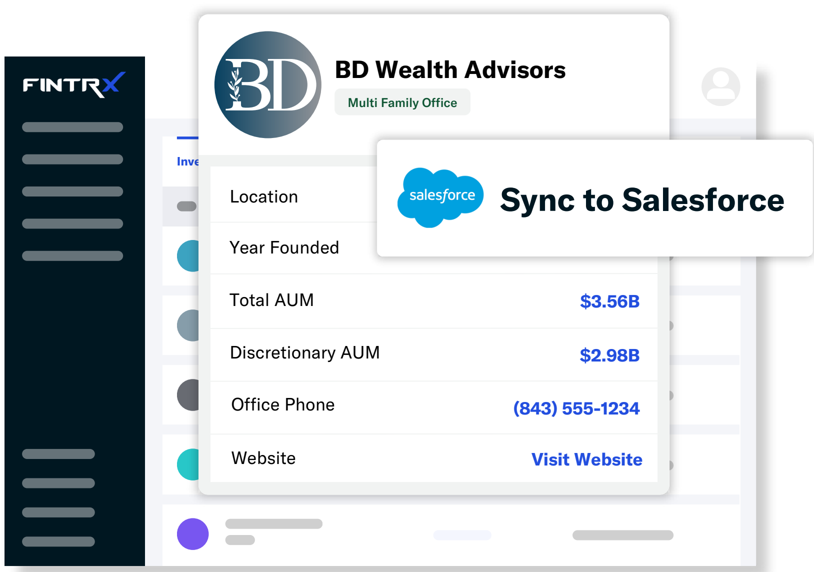
FINTRX Native CRM Integrations

Dynamics | Salesforce | HubSpot | Navatar

Altvia | Buildout | Jungo | Practifi | Sycamore

Bespoke Wealth Management Data Delivered Directly to Your Systems

Access family office & investment advisor data seamlessly within your CRM instances.



Direct CRM Access Within FINTRX Browser Extensions

Instantly Sync:

- Lists, firms & contacts
- Firm & contact news mentions
- Detailed investment activity
- Contact passions & interests

Integration Includes:

- 200+ firm & contact data fields
- Customized data syncs and mapping options
- Real-time data updates within your CRM instance

Streamline Data Management & Simplify Your Workflow

Leverage FINTRX data to power your campaigns, workflows and prospecting efforts. Maximize efficiency in your daily workflows.

Customize the data you wish to sync or send all 200+ fields with a single click. Control team-wide syncing permissions & data mapping.

Keep track of investment activity, portfolio changes, news mentions, contact information updates, advisor movements and more.

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