

The Asset-Raising Playbook

A High-Level Guide to Raising Capital Within the Private Wealth Ecosystem

Day 1

Initial Research

- Gather information about the company, key contacts & pain points.
- Identify [investment preferences](#), [AUM](#), [decision-makers](#), [asset class interests](#) & other valuable information.
- Using [FINTRX AI Search](#), type or speak your query & our AI will generate precise results for you.
- Using [Relationship Path](#) powered by FINTRX AI, you can leverage your network to surface warm introduction opportunities for you and your team.

Day 2

Initial Email

- Leverage [FINTRX AI](#) to create a personalized email introducing yourself and your company; Tailor your email based on the insights gathered during your research process.
- Identify a pain point and provide a tailored solution or value proposition to address their unique needs.
- Share a relevant PDF, white paper or report on broader market perspectives that tie into the underlying strategy you are trying to sell.
- End with a clear call to action for a meeting or call. (i.e. 'I will be traveling with our lead PM on X dates and would love to chat more about this if you would find that beneficial.')

Day 4

LinkedIn Request

- Send a connection request on LinkedIn with a personalized message; Mention your recent email outreach.
- Enrich your LinkedIn experience with the power of [FINTRX 360°](#), a tool that identifies potential associates to drive warm introduction opportunities (shared alumni, work history & more).

Day 6

Follow-Up Email

- Send a follow-up email referencing your initial email.
- Provide additional value, such as a relevant article, case study, testimonial, white paper, etc.

**Day
8**

Phone Call

- Call the prospect directly.
- If you reach them, introduce yourself and your company, and briefly explain the purpose of your call.
- If unavailable, leave a concise voicemail with a callback number.
- We've always found that the best practice is to send an email or two before the first phone call so they have information to review beforehand.

LinkedIn Follow-Up Message

- If the connection request was accepted, send a follow-up message on LinkedIn.
- Reference your previous email and phone call attempts.
- Mention any mutual connections or relevant commonalities you discovered using [FINTRX Affinity](#).
- Ask if they'd be open to a short discussion around areas of overlap.

**Day
10**

**Day
17**

Value Email

- Send an email offering value without a hard sell.
- Include valuable content like a free e-book, webinar invitation, or industry report.
- Reiterate your interest in a meeting or call.
- At this point, you've made five touchpoints into a best perspective investor and it's best practice to spread out touchpoints even further.
- This may also be a good time to use the [FINTRX news portal](#).

Follow-Up Phone Call

- Call the prospect again.
- Reiterate your value proposition and suggest a brief meeting if you reach them.
- If you leave another voicemail, reference your previous attempts and the value you've provided.

**Day
24**

**Day
30**

Social Media Engagement

- Like, comment on, or share their posts on LinkedIn.
- Demonstrate your interest by sharing valuable, relevant content they would find insightful or fascinating.

Final Email Attempt

- Send a final email attempt acknowledging this is your last outreach; Highlight previous outreach attempts.
- Emphasize your value proposition and how you can help their business.
- Create urgency by mentioning a limited-time offer or upcoming event.
- Indicate you will remain available should they wish to revisit the opportunity.
- If there's still no response, add the prospect to a longer-term nurturing campaign.

**Day
40**



Do's & Don'ts for Asset-Raising Professionals

DO'S

Polite Persistence

Follow up regularly but politely with potential investors. Persistence shows dedication, but it's crucial to remain respectful and considerate of their time.

Long-Term Nurturing

Cultivate relationships over time. Utilize FINTRX's [CRM integrations](#) and follow-up features to ensure you maintain regular, meaningful touchpoints with your prospects.

Stay Privy to Relevant News

[Set up alerts](#) to stay informed of news, personnel changes & other updates that could signal new fundraising opportunities. Share relevant articles and insights to demonstrate your awareness & thought leadership.

Personalize Communication

Personalize your communications using [FINTRX AI Search](#). Additionally, tools like the [Contact Relatability](#) feature & [Smart Bios](#) enable you to craft messages that resonate with your prospects by aligning with their interests, backgrounds & investment preferences.

Prioritize Warm Introductions

Leverage FINTRX's 'Potential Associates' algorithm to identify shared connections that can facilitate warm introductions to your target family offices and RIAs.

Leverage FINTRX Data & Tools

Utilize FINTRX data, featuring [375+ search filters](#) & cutting-edge tools, to gain credible insights into investor profiles, track engagement & manage your outreach efficiently.

DON'TS

Don't Send One Email and Expect a Response

Building relationships takes time. Don't expect immediate responses from a single email. Follow up appropriately and demonstrate ongoing interest.

Don't Hound Prospects Over a Short Period

Bombarding potential investors with frequent messages in a short span can be off-putting. Space out your communications to avoid coming across as desperate or aggressive.

Don't Neglect to Personalize the Information

Avoid bombarding prospects with excessive articles and updates. Too much information can be overwhelming and may lead to disengagement.

Don't Send Templated Emails

We highly advise against mass bulk emails. Investors can easily spot templated messages, which can make your outreach seem impersonal and unprofessional. Personalize all communications.

Don't Ignore Investor Preferences

Pay attention to the specific preferences and interests of each investor. Ignoring these can lead to disinterest or disengagement.

Don't Neglect Existing Relationships

Maintain and nurture your current investor relationships. Leverage [CRM & data enrichment tools](#) to stay organized and keep track of past interactions (individual & team-level).