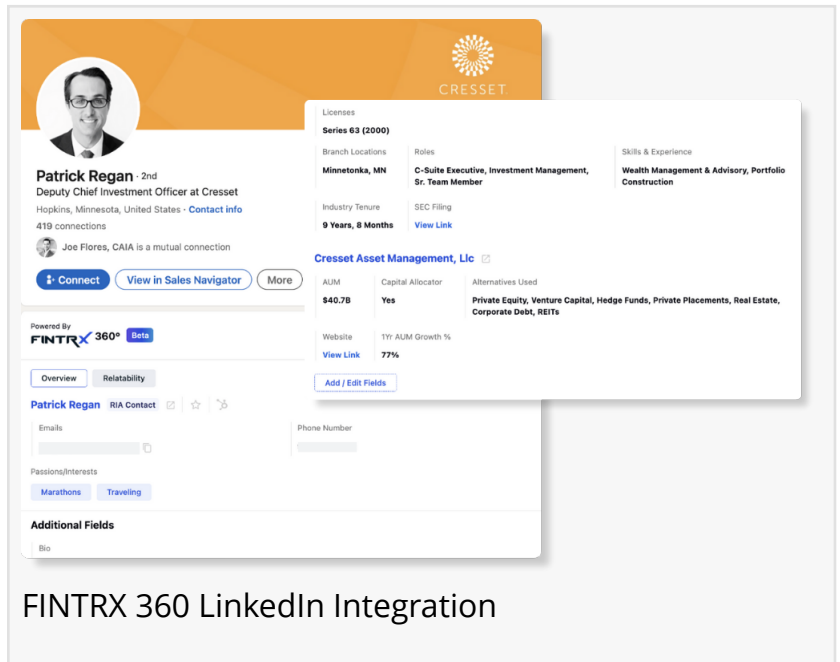


FINTRX Debuts 360 LinkedIn Integration

FINTRX, the leading provider of private wealth intelligence, announces the launch of its highly anticipated 360 LinkedIn Integration

BOSTON, MA, UNITED STATES,
December 11, 2023 /

EINPresswire.com/ -- FINTRX, the leading provider of private wealth data intelligence, is excited to announce the launch of its revolutionary FINTRX 360 LinkedIn Integration. This cutting-edge integration is designed to enhance the networking and prospecting capabilities of financial professionals.



The screenshot shows a LinkedIn profile for Patrick Regan, Deputy Chief Investment Officer at Cresset. A FINTRX 360 overlay is displayed, providing a comprehensive view of the contact's data. The overlay includes:

- Licenses:** Series 63 (2000)
- Branch Locations:** Minnetonka, MN
- Roles:** C-Suite Executive, Investment Management, Sr. Team Member
- Skills & Experience:** Wealth Management & Advisory, Portfolio Construction
- Industry Tenure:** 9 Years, 8 Months
- SEC Filing:** View Link
- Company:** Cresset Asset Management, Llc
- AUM:** \$40.7B
- Capital Allocator:** Yes
- Alternatives Used:** Private Equity, Venture Capital, Hedge Funds, Private Placements, Real Estate, Corporate Debt, REITs
- Website:** View Link
- 1Yr AUM Growth %:** 77%
- Additional Fields:** Bio

FINTRX 360 LinkedIn Integration

The FINTRX 360 LinkedIn Integration brings the wealth of data from the FINTRX family office and RIA (Registered Investment Advisor) data platform directly into the LinkedIn interface. When viewing a LinkedIn profile, FINTRX users can now access a rich dataset that provides an in-depth look at 50+ FINTRX data points to view on each contact directly within LinkedIn. Pull in email

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By seamlessly integrating our comprehensive data into the LinkedIn platform, we are providing our users with a true competitive edge.”

Russ D'Argento, Founder & CEO

addresses, passions, interests, smart bios', contact roles & responsibilities, disclosures, firm AUM, growth rates, and more. This first-of-its kind integration serves as a bridge to more personalized and informed interactions, empowering professionals in wealth management, asset management, and financial advisory services to engage with a tailored approach.

“We are thrilled to introduce the FINTRX 360 LinkedIn Integration, which is set to transform the way professionals connect and engage within the private wealth landscape,”

said Russ D'Argento, Founder and CEO of FINTRX. "By seamlessly integrating our comprehensive data into the LinkedIn platform, we are providing our users with a true competitive edge."

Key features and benefits of the FINTRX 360 LinkedIn Integration include:

- Comprehensive contact information: Users can access professional titles, biographies, detailed role descriptions, and more within LinkedIn.
- Credentials and compliance details: Explore investment committee members, CRD numbers, executive statuses, firm ownership, registration statuses, and licenses.
- Geographical footprint: View branch and headquarters locations, rep movement and more.
- Investment patterns and AUM details: Gain insight into investment preferences, AUM details, capital allocator status, alternative investments used and growth trends.
- Seamless CRM and workflow enablement: Users can log notes, tasks, and tags on contacts, add contacts to lists, apply custom properties, mark favorites, sync contacts to Salesforce or HubSpot CRM, and more—all directly within LinkedIn.

"At FINTRX, we continue to commit to bringing the power of FINTRX data to where our users work. The launch of the FINTRX 360 LinkedIn Integration is a testament to our dedication to providing seamless access to comprehensive private wealth data intelligence within the platforms our users rely on daily." - Russ D'Argento, Founder & CEO

About FINTRX:

FINTRX is the preeminent resource for private wealth data and research. Its platform features millions of data points on the global Family Office and Registered Investment Advisor ecosystem. Thousands of users at leading firms trust FINTRX to leverage the power of intelligent data, target the correct firms for capital raising, build stronger relationships, and make better data-informed decisions. With its intuitive search engine, proactive alerts, network-expanding capabilities, and warm introduction paths, FINTRX helps customers efficiently uncover new opportunities to grow their businesses and drive successful outcomes.

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