

# FINTRX & Ultimus Fund Solutions Announce Partnership

*FINTRX partners with Ultimus Fund Solutions, giving asset managers direct access to AI-powered private wealth intelligence to enhance fund distribution.*

BOSTON, MA, UNITED STATES, December 15, 2025 /EINPresswire.com/ -- [FINTRX](#), the AI-powered



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Of Distribution Strategies*

private wealth intelligence platform for asset managers and other investment professionals, has announced an exciting partnership with [Ultimus Fund Solutions](#), a leading provider of fund administration and investor servicing solutions. This collaboration aims to empower Ultimus' asset management clients with seamless access to FINTRX's cutting-edge private wealth intelligence, further enhancing their product distribution strategies.

Through this partnership, Ultimus clients will gain direct access to FINTRX's robust platform, which features detailed

profiles and data on registered investment advisors (RIAs), broker-dealers, family offices, and other private wealth entities. By leveraging FINTRX's comprehensive data and intuitive technology, Ultimus' clients can refine their outreach, identify new distribution opportunities, and build stronger relationships with key decision-makers across the private wealth ecosystem.

## Driving Success Through Innovation

Ultimus Fund Solutions has a long-standing commitment to providing clients with best-in-class tools and resources to support their success. By integrating FINTRX's industry-leading private wealth data into its service offering, Ultimus further demonstrates its dedication to innovation and client-centric solutions.

"Ultimus is committed to forming strategic partnerships with organizations that deliver meaningful value to the distribution efforts of our investment management clients", says Kevin Guerette, SVP Director Of Distribution Strategies. "After evaluating various providers of broker and advisor data, it became evident that FINTRX stands out with its state-of-the-art platform and unparalleled flexibility to meet the diverse needs of the asset managers we serve. We are excited to collaborate with FINTRX and look forward to deepening our partnership as the industry continues to evolve."

## Enhancing Reach and Efficiency

FINTRX's proprietary platform is designed to streamline workflows, save time, and uncover insights that might otherwise remain hidden. By partnering with FINTRX, Ultimus clients will now have the ability to:

- + Pinpoint high-value targets within the private wealth space
- + Access enriched data on family offices, RIAs, broker-dealers, and endowments & foundations
- + Leverage actionable insights to optimize their distribution strategies
- + Utilize FINTRX AI tools to uncover deeper insights, streamline workflows, and enhance decision-making through AI-driven recommendations
- + Seamlessly integrate FINTRX's data and tools with their existing CRM systems for improved efficiency and centralized management of client interactions

"We're proud to partner with Ultimus, an organization that shares our dedication to driving meaningful value for asset managers.", says Russ D'Argento, Founder and CEO of FINTRX.

"Through this partnership, we're enabling their clients to access deeper insights, streamline their outreach, and accelerate their distribution strategies. Together, we're giving asset managers a more efficient, scalable way to identify new opportunities and build lasting relationships across the private wealth landscape."

## About Ultimus Fund Solutions

Ultimus Fund Solutions is a leading provider of full-service fund administration, accounting, and investor servicing solutions for traditional and alternative investment managers. With a focus on client service and innovation, Ultimus delivers tailored solutions that drive efficiency and growth. For more information, visit [www.ultimusfundsolutions.com](http://www.ultimusfundsolutions.com).

## About FINTRX

FINTRX is the premier AI-powered private wealth intelligence platform, delivering real-time, human-verified data on 850,000+ financial records across 70,000+ firms, including RIAs, broker-dealers, family offices, wealth teams, and endowments. With access to 750,000+ key contacts and advanced AI tools, FINTRX enables users to uncover capital sources, track allocation trends, analyze investments, and surface warm introductions, all in one platform. Purpose-built for asset raising, product distribution, and business development, FINTRX combines data accuracy with powerful AI to streamline workflows, enhance targeting, and drive revenue outcomes across the private wealth landscape.

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