

FINTRX Introduces AI Elements, Transforming How Investment Professionals Analyze Private Wealth Data

FINTRX launches AI Elements, empowering financial professionals to create custom data, analysis, and insights using AI-driven intelligence.

BOSTON, MA, UNITED STATES, October 28, 2025 /EINPresswire.com/ -- FINTRX, the AI-powered

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*Russ D'Argento, Founder and
CEO of FINTRX*

private wealth intelligence platform for asset managers and other investment professionals, today launched [AI Elements](#) — a new tool that enables users to create custom data fields, scoring models, and analytics inside the FINTRX platform. Using simple natural-language prompts, users can define their own data points across FINTRX's existing intelligence on registered investment advisors (RIAs), broker-dealers, wealth teams, and family offices, enabling faster, more targeted engagement and

smarter decision-making.

AI Elements removes the limitations of predefined datasets by allowing users to generate tailored data and analysis that reflect their business strategy. Natural-language instructions are translated into structured, persistent data points that integrate everywhere in FINTRX — in profiles, search, filters, lists, and exports.

“AI Elements represents a fundamental evolution in how our clients interact with data,” said Russ D'Argento, founder and CEO of FINTRX. “For years, we’ve delivered comprehensive private wealth intelligence. Now, we’re enabling our users to define and generate intelligence that’s unique to them and that adapts to their goals, processes, and strategies.”

Examples of what users can instruct FINTRX AI to create include:

- Analyze actively traded ETF portfolios to surface buying and selling trends that signal new product opportunities.
- Score each investment manager from 1–10 based on recent ETF AUM growth and alignment with index-based strategies.
- Identify the top three highest-rated dinner locations near this firm’s main office, including

cuisine type, distance, and a quick reference link.

FINTRX developed AI Elements in response to client demand for deeper personalization and intelligence tailored to their specific strategies.

With AI Elements, users can now create custom metrics and signals such as:

- Product Fit Scores to rank RIAs based on custodian alignment, ETF exposure, and historical allocation patterns
- Momentum and Adoption Signals to detect increasing product usage or shifting exposure among firms
- Breakaway Risk Indicators to identify representatives more likely to transition based on structural and historical movement data
- ETF Exposure and Concentration Analysis to quantify issuer preference and whitespace opportunity
- Personalized Outreach Insights that automatically deliver relevant talking points to key decision-makers

AI Elements supports multiple structured output formats to meet a wide range of analytical and engagement needs:

- Free Text – For narratives, qualitative insights, and contextual analysis
- Number – For rankings, scoring, and performance metrics
- Dollar – For capital flows, client metrics, and AUM values
- Percent – For allocation breakdowns, whitespace analysis, and growth trends
- Single and Multi Select – For classifications, segmentation, and thematic tagging

The launch of AI Elements builds on the momentum of FINTRX's rapidly expanding AI suite, which continues to transform how asset managers and other investment professionals access the growing wealth markets. Following the successful introduction of AI Search, which enables natural language searching of FINTRX's industry leading wealth intelligence, and AI Analyst, which delivers instant, context-rich firm analysis and opportunity assessments, AI Elements represents the next step in that evolution.

FINTRX plans to unveil additional AI-powered capabilities in the coming months, further extending its mission to redefine how the private wealth market is understood, accessed, and acted upon.

About FINTRX

FINTRX is the leading AI-powered intelligence platform built to streamline how asset managers, fund distributors, and financial services providers identify, research, and engage the global private wealth ecosystem. Trusted by hundreds of leading financial institutions, including The TCW Group, PIMCO, KKR, and Addepar, FINTRX delivers comprehensive data on 40,000+ RIAs,

family offices, and broker-dealers, as well as 760,000+ key decision makers, empowering clients to build deeper relationships, accelerate growth, and drive smarter distribution. For more information visit www.fintrx.com.

Media Contacts:

Newton Park PR, LLC
Margaret Kirch Cohen
+1 847-507-2229
margaret@newtonparkpr.com

Kathy Panagopoulos
+1 773-710-7433
kathy@newtonparkpr.com

Rich Donnellan
FINTRX
rich.donnellan@fintrx.com

Visit us on social media:

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