



# Family Office List



The Most Accurate Family Office Database  
Designed to Help You Get Funding

Our data is offered in 3 different geographic packages:

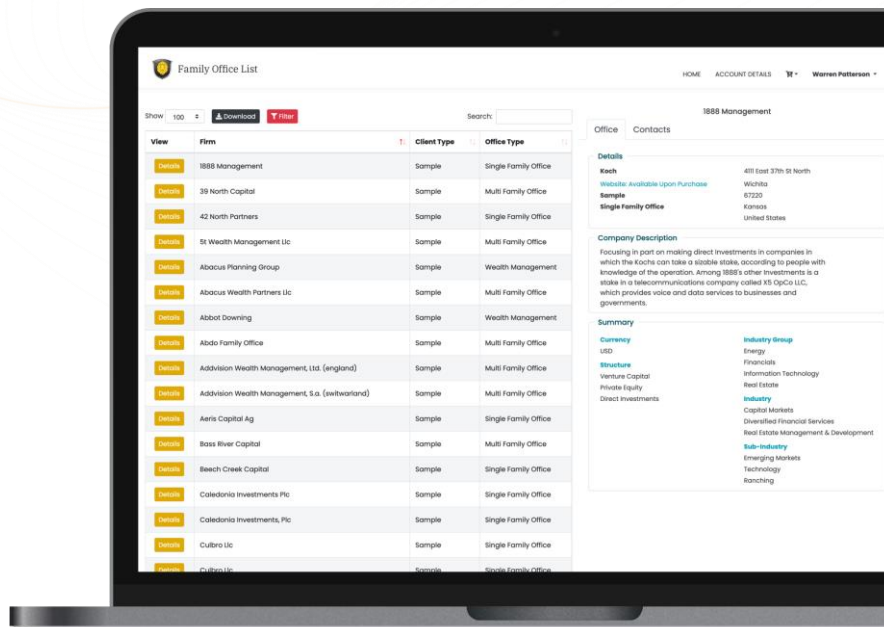
<p><b>GLOBAL FAMILY OFFICES</b></p> <p>All contacts worldwide</p>	<p><b>NORTH AMERICA FAMILY OFFICES</b></p> <p>USA + Canada</p>	<p><b>INTERNATIONAL FAMILY OFFICES</b></p> <p>Everything but the USA</p>
<p><b>Monthly Subscription</b> Unlimited access, paid monthly *3-month minimum agreement</p> <p><b>\$599/mo</b></p>	<p><b>Monthly Subscription</b> Unlimited access, paid monthly *3-month minimum agreement</p> <p><b>\$399/mo</b></p>	<p><b>Monthly Subscription</b> Unlimited access, paid monthly *3-month minimum agreement</p> <p><b>\$399/mo</b></p>
<p><b>Annual Subscription</b> Unlimited access, paid annually Best value at just \$250/mo</p> <p><b>\$2995/yr</b></p>	<p><b>Annual Subscription</b> Unlimited access, paid annually Best value at just \$175/mo</p> <p><b>\$1995/yr</b></p>	<p><b>Annual Subscription</b> Unlimited access, paid annually Best value at just \$175/mo</p> <p><b>\$1995/yr</b></p>
<p>Total Offices ..... 4,187</p>	<p>Total Offices ..... 2,288</p>	<p>Total Offices ..... 2,038</p>
<p>Total Contacts ..... 7,751</p>	<p>Total Contacts ..... 4,454</p>	<p>Total Contacts ..... 3,550</p>
<p>Direct Emails ..... <b>7,475</b></p>	<p>Direct Emails ..... <b>4,387</b></p>	<p>Direct Emails ..... <b>3,169</b></p>

# EXPERIENCE THE BENEFITS

- Access the most accurate and expansive family office data and research - updated daily.
- Explore our extensive data using our Dynamic Search tool - built with 50+ filters - ensuring delivery of what you need, when you need it.
- Uncover your best path in & shared commonalities by leveraging contacts' background, experiences, shared passions, and connections.
- Download the data to Excel anytime for seamless CRM Integration
- Showcase your products, services, and investment opportunities through your private user profile.
- Work smarter in a community model with our team if you have a project requiring specific research.
- Rest assured with our money back guarantee and transparent engineering that our data is the most up-to-date available.

## The following data points are included and can easily be filtered to meet your targeting requirements:

- Name of Family Office
- Type of Family Office (Single Family Office, Multi Family Office, etc.)
- 1-3 High-Level Contacts Listed per Firm with Titles
- Direct Phone & Email: 98%
- LinkedIn: 96%
- Website: 96%
- Address: Country, City, State & Zip: 100%
- Company Description: 100%
- Investment preferences AUM (65%), Deal Structure Preference (95%), Typical Deal Size (55%), Industry Sector (94%) & Target Geography (95%)



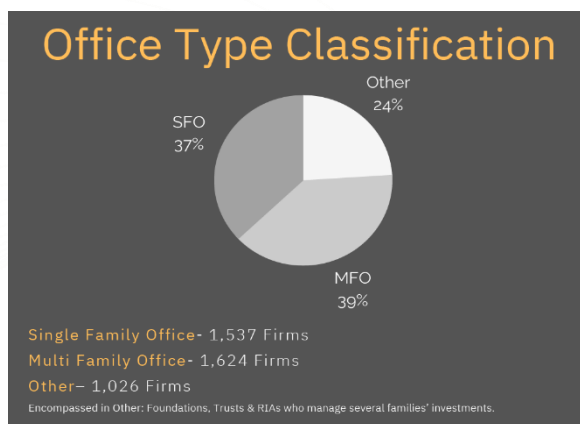
# OUR FAMILY OFFICE LISTS

Our database was designed as a tool to raise capital and reach UHNW Family Office Investors. Our clients get invaluable information at their fingertips for over 7,751 decision-makers from 4,187 individual Family Office Firms with collective AUM over \$6 trillion – all updated daily and available in live-time through our cloud-based platform.

Our goal as we further develop our platform is to engage the Family Offices within our network to better understand their investment objectives. With these valuable details, we can better connect affluent Family Offices with our clients' well-suite deal flow.

## We categorize the various firms encompassed by the term "Family Office" as follows:

- Single Family Office
- Multi Family Office
- Family Foundation
- Family Trust
- Asset Management (Multi-family office where registered investment advisors manage multi-family investments)



## WHO ARE WE?

Family Office List was founded in 2001 by Douglas Father as a tool to help identify and raise capital for various Investment Funds. Since then, he has launched several other financial service companies providing tools to accelerate fund raising efforts in an efficient & cost-effective manner. As the Family Office sector has grown, so has our data and dynamic team. Driven by a powerful marketing engine, a sophisticated development team and meticulous researchers, Family Office List continues to be a leading data provider. We continuously forge impactful partnerships and extensive networking to provide clients with cutting-edge technology, out-of-the-box solutions, and precise data. We have been forging relationships within the Family Office Industry for over 22 years to engage and understand investment objectives. The contacts within our database are aware of their inclusion and are removed upon request. Techniques for building and maintaining the data include:

- Attending industry conferences as pandemic regulations allow
- Completing line by line contact checks
- Utilizing APIs to test the telephone numbers and email addresses.
- Conducting our own email campaigns to experience the data fist hand.
- Hours of direct outreach via phone calls and direct LinkedIn messaging
- Access to exclusive virtual groups founded by Family Offices to share investment objectives.
- Money-back guarantee incentivizing customers to collaborate if data is problematic so our researchers can provide timely & transparent updates for everyone's benefit.

## Our Commitment & Risk-Free Guarantee

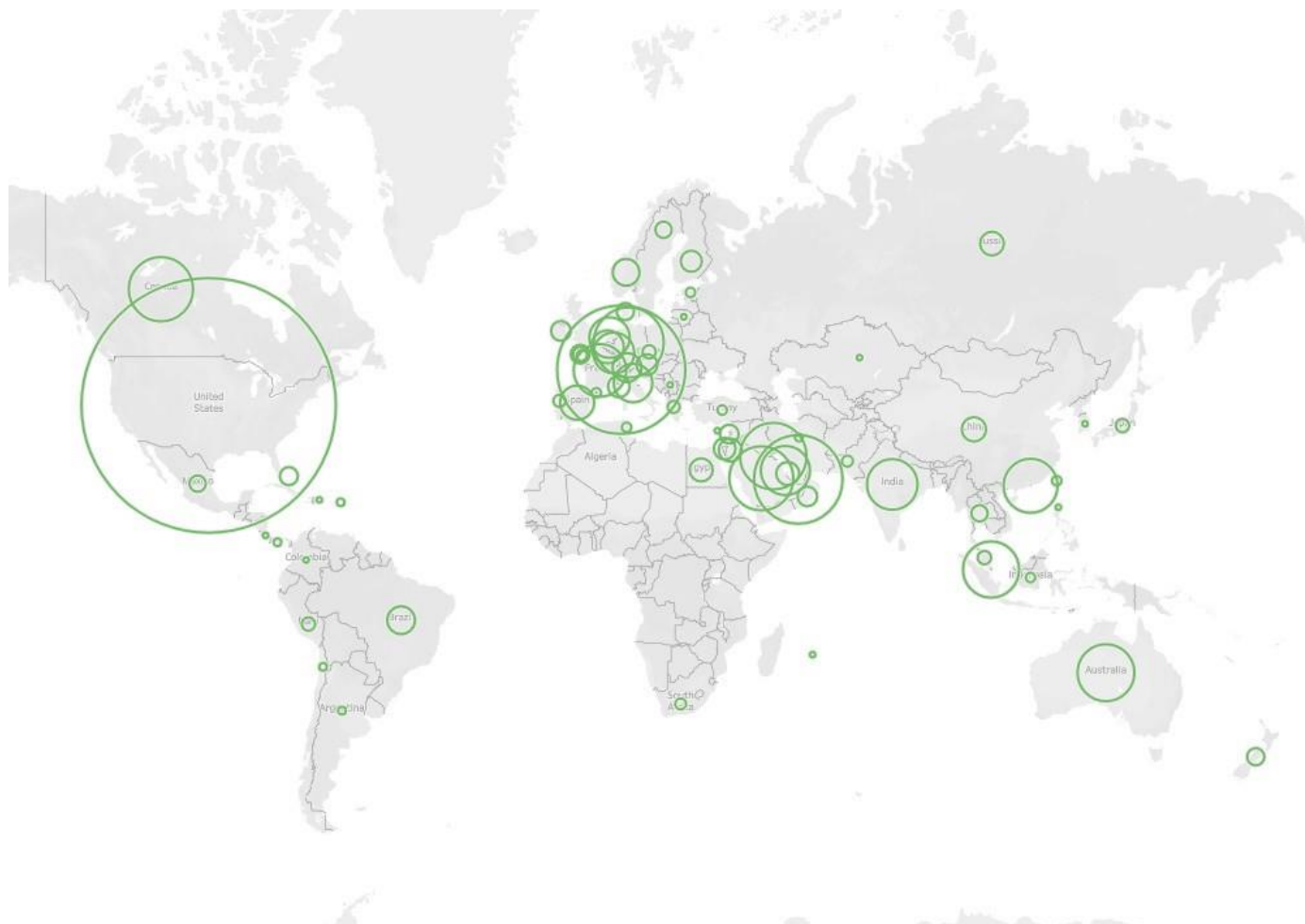
Our mission is to create a premium Family Office Platform to help clients reach a sophisticated audience in an efficient manner. Our core focus is on the accuracy of our data, which is easily navigated through a robust yet user-friendly platform.

Because our research team works rigorously to ensure the veracity of our data, we guarantee that the listing is a Family Office and that the contact information is up-to-date and accurate. With our risk-free guarantee, customers have access to ongoing updates through the platform for 12 months, at no additional cost. A time stamp feature provides transparency for when contacts were last updated.

We pride ourselves on our customer service and communication. We have gone as far to engineer a system to encourage customer collaboration as a community model for everyone's benefit. Working with clients to achieve their goals is what makes us good at what we do.



# UNRIVALED DATA FOR FAMILY OFFICES WORLDWIDE



REGIONS	TOTAL # FAMILY OFFICES	TOTAL # CONTACTS
USA	2,147	4,200
Europe	942	1,675
ME-Africa	342	668
UK	185	252
Asia-Pacific	388	629
Canada	123	234
Latin Amer-Caribbean	58	93
<b>TOTAL</b>	<b>4,187</b>	<b>7,751</b>



# EXPERIENCE THE BENEFITS

- Access hard-to-find details for 7,751 contacts from 4,187 firms.
- Leverage technology to work smarter, not harder and establish valuable relationships with Family Offices.
- Have all the tools to thoroughly research, connect and expand your network.
- Take advantage of the endless hours our team has spent networking, building, and maintaining our database since 2001.
- Get access to a curated list of Family Offices with an expressed interest in direct investing.
- Utilize our user-friendly platform with targeting features to align yourself with well-suited Family Office partners.
- Share your products, service, and opportunities to expand your marketing outreach.



## Data for offices worldwide

Connect with thousands of high net worth investors and potential clients across the globe.



## Guaranteed accuracy

We guarantee that our data is accurate, and that the listing is a Family Office, or we'll provide a full refund on a per-contact basis.



## Detailed contact information

Quickly, easily and reliably engage with family offices with data rich information profiles.



## Instant access

Once payment has been made, you will automatically receive an email with a receipt and access to the platform.



## Advanced targeting

Our lists can be filtered, sorted, modified and customized to suit your targeted marketing needs.



## Free Real-Time Updates

Daily updates are accessible through the platform at no cost for 12 months and renewable thereafter.



## Export to Excel

Easily export data from the platform to Excel for easy integration with your CRM.



## Cost-Effective

Our lists are competitively priced.



## Access from Anywhere

Our cloud platform offers accessibility from anywhere at any time.



# WE ARE FAMILY OFFICE LIST AND WE WANT TO HELP YOU GET FUNDING

## What differentiates your lists from your competitors?

We offer the most robust, up-to-date, and affordable database. Our core focus is on providing the highest quality data for our customers while simultaneously offering value to the Family Offices desiring well-suited deal flow. Customers benefit from the product of over 22 years of continuous development to deliver unrivaled data coverage. We do not try to be all things to our clients by pushing additional information, subscriptions, or marketing services, yet rather focus on delivering accurate data in an efficient and transparent manner. We listen to customers' needs, develop solutions, and work together to ensure 100% satisfaction. As a result, we have *recently added* two new lists focusing on **venture capital** and **private equity** firms.

## Do you guarantee the quality?

*Absolutely!* Quality service and customer retention is of utmost importance, so we invest the time to properly maintain the data for our clients. If you find any of the information to be problematic, we update the information for you. If the information cannot be updated in a timely manner, we provide a full refund per-contact. We work together with customers, to ensure the highest quality for everyone's benefit. After all, the data is the core of our business.

## How often is the data updated?

The size and scope of detail provided through our database requires daily maintenance. It is conducted manually through direct outreach. Live-time updates are available at no additional cost to platform subscribers for 12 months. There's a time stamp associated with each contact so customers can easily identify updates and additions.

## Can I upgrade my account?

We encourage starting outreach where your current marketing needs require and growing over time. Customers can always start with our North American or International packages and upgrade to the full Global when the time is right.

## Do the Family Offices know they are listed?

Prior to our platform launch, our team conducted extensive outreach campaigns to build brand awareness amongst Family Offices & expand our data coverage. This required working directly with Family Offices to populate investment preferences. During this outreach, if any firm wished to be unsubscribed, we complied. The integrity of our brand is key, and we have put in the time to establish trust and transparency.

## Can I use your list to email family offices for my fund-raising campaign?

*Certainly!* You will be able to export your purchased list at any time. After applying filters that match your investment goals, just click the **DOWNLOAD** button to extract data from the platform to Excel for easy integration with your CRM. You can then email these prospects for your outbound email marketing strategy. Any time your marketing plan changes, simply change your filters' mix.

## Can you help me market to the family offices in the database?

*Yes!* We provide curated guides with current best practices, share educational content, send useful newsletters, and feature successful strategies through client case studies. This information is very effective for clients who have a team in place to implement the strategies. For clients seeking an outsourced solution, we have a trusted partner who uses our data to run a digital outbound marketing campaign using digital analytics and automation. If you are interested, we can provide an introduction and share a one-pager outlining their marketing solutions.



# OUR CLIENTS

Our clients, ranging from fund managers, traders, investment bankers, to private wealth management firms, have utilized our database of family office contacts to successfully raise capital or enhance marketing efforts. They have experienced how a small handful of family offices can significantly grow an investment firm or high net worth related service. Various investment groups have also purchased with the intent to align themselves for co-investing.

## Who is a typical client?

- Fund Managers
- Private Equity Managers
- Financial Advisors
- Private Wealth Managers
- Third-Party Marketers
- Broker-Dealers
- Business Start-up
- Public Companies
- Accounting Firms
- Law Firms
- Luxury Service Providers



## What Our Clients Are Saying



“The Family Office List has been worth its weight in gold! When the bank turned our client down, one family office partner stepped in and was able to fund two transactions totaling \$21 million.”

- Shane Brandt, CEO Aspen Commercial Lending



“Family Office List has been an invaluable tool for providing introductions to Global Family Offices to our various clients. Roughly 35% of emails were replied to and 10% of those are entering into meaningful conversations about direct investments.”

- Dinesh Sastry, CEO Illuminant Capital Holdings



“Thanks for providing a well-qualified list. We had a great experience using it for an email campaign which yielded an 85% open rate and a 12% reply rate.”

- Tim Charlowood, Founder at Sanctuary Utah



“We utilized the Family Office list for a very specific type of client and were very pleased with the results. Danielle was extremely easy to work with and designed a database that allowed us to contact a variety of groups all in our specific target market. We were able to negotiate a very favorable relationship with one of the contacts.”

- Stephen Strauss, Managing Director at NI Holdings



“We’ve found Family Office Lists to be an outstanding source of connections and knowledge in building of relationships with family offices.”

- Richard Hoffmann, iPaladin LLC



**If you'd like to sample or purchase our Family Office, Venture Capital, or Private Equity lists, our team is always happy to help!**



Call us:  
**+1 704-237-0452**



Email us:  
**sales@familyofficelist.org**



Talk to us:  
**Launch live chat**

**Join the growing number of firms relying on our data...**

