



# CASE STUDY: **CAPSTONE PARTNERS**





**Having Preqin as an additional data source that we can rely on is invaluable to us. It allows us to focus on our core business and leverage the research Preqin has completed.**



### Stacey Walter

Managing Director,  
Capstone Partners

#### **The challenge: picking the right mandates in a crowded fundraising market**

With 19 years of experience in the fast-paced fundraising market, Capstone Partners sees the ever-rising volume of funds in market as a great opportunity for winning new mandates. However, this has a significant impact on its resources when it comes to identifying and evaluating fundraising opportunities.

With a highly selective client focus, it is important that Capstone Partners remains efficient in building, evaluating and prioritizing its fund pipeline. To achieve this, the firm needs access to a comprehensive database with fund-level view providing supplemental information that either validates information or fills in the gaps.

#### **The requirements: keeping the firm focused on core competencies**

In order to focus its resources in Business Development, Capstone Partners needs a solution to:

- Support its preliminary screening process with quick access to background information on GPs
- Access firm and fund information to fill in any gaps or verify information for funds in their pipeline
- Augment comparable fund analyses

**Firm Type:** Placement Agent  
**Asset Class:** Multi  
**Use Case:** Due Diligence, Fund Screening, Manager Evaluation  
**Users:** Business Development  
**Headquarters:** Dallas, Texas  
**Product:** [Preqin Pro](#)  
**Website:** [www.cslp.com](http://www.cslp.com)

#### **About Capstone Partners:**

Founded in 2001, Capstone Partners is a global placement agent dedicated to raising capital for general partners. Capstone Partners has 40 professionals with offices in North America, Europe, and Asia.

The firm aims to maintain between 8 to ten engagements per year ranging from lower-middle market to multi-billion in size, with a broad representation of non-competing private capital strategies.

In addition, Capstone Partners also provides secondary market liquidity solutions with a focus on the GP advisory side.

Overall, the firm needs a solution allowing its team to focus on its core competencies of developing direct relationships with high quality GPs and nurturing its relationships with LPs, while at the same time successfully executing capital raises on behalf of its clients.

**The solution: access data and research at a global level**

With Preqin, Capstone Partners has access to information on more than 26,000 private capital firms globally including background information, team, investment strategy, track record, deals, terms, and more. This supports Capstone Partners' preliminary screening and due diligence process and provides relevant background information.

Capstone Partners benefits particularly from the intuitive Preqin Pro platform, which allows its team to quickly and easily search for specific information on a GP or run a broader search by investment strategy. With the ability to export search results to Excel, the team can also run additional analyses.

The firm also relies on Preqin Pro's News Alerts to receive daily notifications of any investor activity or fundraising news. This gives the firm a second layer of reliable information delivered directly to inboxes and diminishes the risk of missing key updates. All of this allows its team to focus on its core competencies – nurturing relationships with GPs and LPs.

**Additional marketing in Preqin's reports**

Capstone Partners not only benefits from Preqin's data and tools but also leverages Preqin's coverage of the industry through advertising opportunities that come with Preqin's research publications.

To expand Capstone Partners' exposure in private markets globally, each year the firm partners with Preqin to author relevant articles and to advertise its completed mandates in publications such as Preqin's Global Reports and Quarterly Updates covering each alternative asset class.

These publications are trusted, authoritative guides to the alternatives industry and offer must-read insights to over 100,000 key decision makers and industry professionals, providing a platform for Capstone Partners to showcase its expertise and success to a global audience.



**From a marketing perspective, we want to be part of a brand name with high-quality reports that industry professionals recognize and respect. The reports provide good opportunities for us to author articles and to advertise our fundraising success.**



**Stacey Walter**

Managing Director,  
Capstone Partners

**The results: successful fund raises that have led to repeat clients**

With Preqin, Capstone Partners is confident it has found a private markets data provider to not only rely on for vital information but to also support its brand awareness efforts on a global level.

In addition, Capstone Partners' efficient sourcing and due diligence process has led to great successes, selecting clients for whom the firm has been able to execute capital raises exceeding expectations.

As a result, in most cases Capstone Partners has been hired for follow-on fund raises.



**I've always been impressed by the quality of the Relationship Managers and the Customer Service team. The customer service standard is very high and each person I've interacted with is professional and responsive.**



**Stacey Walter**  
Managing Director,  
Capstone Partners

## Why Capstone Partners chose Preqin:

- Access to detailed information on 26,000+ private capital firms globally including investment strategy, fundraising activity, performance track records, and more
- Daily customizable email alerts on investors' activity powered by the 100,000+ monthly updates made by Preqin's global team of 300+ Researchers
- All teams in all locations are supported by a professional and responsive Preqin Customer Service team



# About Preqin

Preqin is the Home of Alternatives<sup>®</sup>, the foremost provider of data, analytics and insights to the alternative assets community. From pioneering rigorous methods of data collection to developing a revolutionary platform, we have committed ourselves to furthering the understanding of alternatives for over 17 years. Through close partnership with our clients, our 300 researchers based in key financial centres worldwide combine with cutting-edge technology to make sure our data and research is unique, timely, accurate and insightful.

Today, over 99,000 fund managers, investors, placement agents, service providers, advisors and other industry professionals from more than 29,000 firms worldwide are empowered with information that underpins their daily workflow including fundraising, asset allocation, investor relations, origination and business development.

- Private Equity & Venture Capital
- Private Debt
- Hedge Funds
- Real Estate
- Infrastructure
- Natural Resources

**40,500+**  
Firms

**17,800+**  
Investors Monitored

**109,000+**  
Funds

**35,300+**  
Funds with  
Performance

**487,000+**  
Deals and Exits

**230,000+**  
Curated Contacts

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