### Boutique Small and Mid Value Asset Manager Seeks Case Study: Advisor Brand Awareness and Engagement

## The Challenge

Small employee-owned asset manager has strong positioning for brand, products & value proposition but like many boutique managers, has had limited marketing resources and development dollars.

## The Current State

#### Goal:

Increase brand awareness and mindshare of advisors broadly.

40

\$2.5 billion

\$350,000

United States

Employees:

AUM:	

Budget:

Presence:

Investment Capabilities:

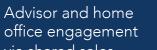
- Value
- Small and Mid-Caps
- Long/Short

Channels: Primarily Institutional





 $\sim$ 



office engagement via shared sales, national accounts, and marketing personnel

## The FLX Advantage



## **Cost Savings**

- 85% savings vs. maintaining same personnel and licenses in house
- \$225,000+ annual savings in partnership program access to leading B/D and TAMP platforms
- 80% cost savings vs. other video providers



## **Growth Potential**

- 6,500 individual sales touchpoints over 12 months
- Quarterly flows have increased 250%
- Platform placement at three leading • broker dealer platforms
- 250,000+ emails sent to validated • and targeted advisors and home office contacts in 2023 alone



Access to leading broker dealer platforms through strategic partnerships



#### Productivity

- Time otherwise spent on sales efforts and marketing is now dedicated on internal focuses and expertise
- Extend the utility of written commentaries by converting to videos

# 

Lead gen and exposure created via regularly promoted emails and social media posts

<u>∭</u>⊳ よ2

Brand, people, and product storytelling via award-winning video content: brand video, manager spotlights, and remote quarterly product commentaries