

# Asset Manager Membership

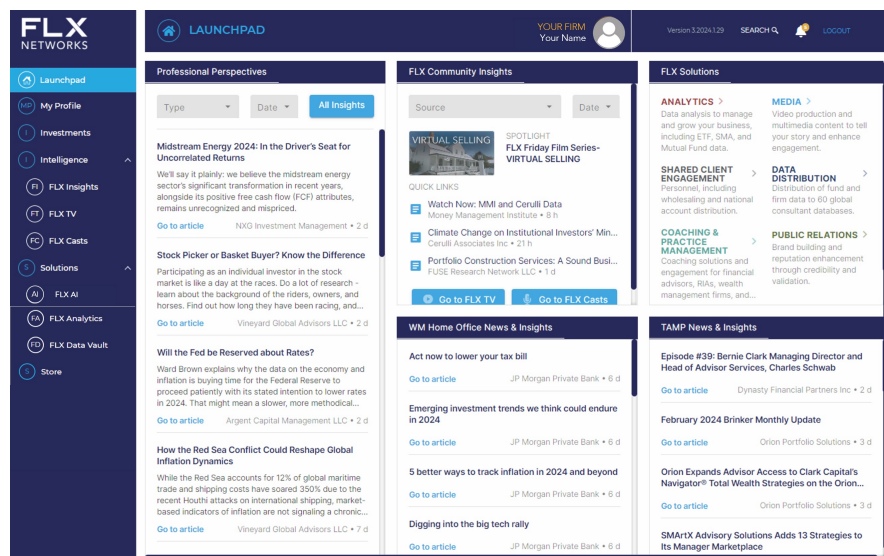
## Simplify and Modernize Engagement Between Wealth Managers and Advisors

FLX's Asset Manager Membership delivers a singular destination to learn, connect, and better navigate the complex asset and wealth management ecosystem. Membership unlocks a smart homepage, three private exchanges, a storefront to share your investment products and commentary, access to exclusive insights, and much more.

### Launchpad – Your New Homepage:

This easily navigable and customizable dashboard offers:

- Thought leadership highlights
- Real-time industry insights
- Business solutions
- News and channels tailored to your content preferences



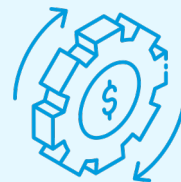
### Investments Exchange:

Share your investment ideas, collateral, and platform availability through your Community Page (see below).



### Intelligence Exchange:

Share thought leadership or investment product updates to a growing audience of wealth management members.

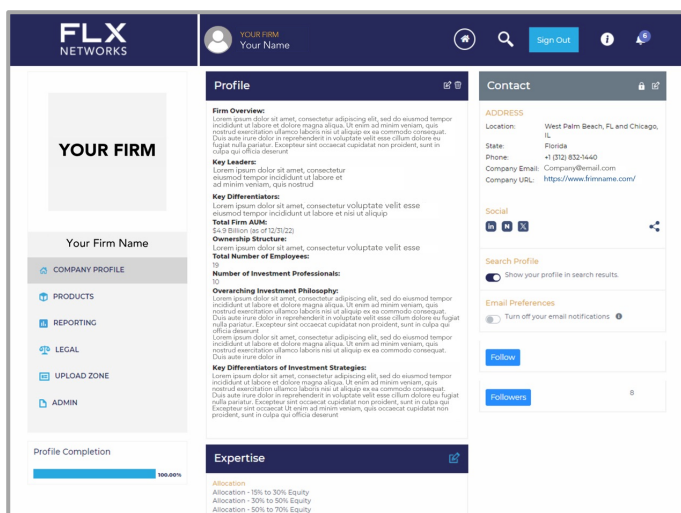


### Solutions Exchange:

Access a suite of curated business services providing productivity enhancements, growth potential, and cost savings up to 75%.

### Community Page – Your Storefront:

Your Community Page enables you to efficiently share information and interact with clients and prospects. It is a central location for your firm overview, product collateral, platform availability, legal documents, training materials, and more.



### Community Insights – Your Intel:

All FLX Asset Manager members benefit from exclusive and aggregated industry insights – available at any time on the FLX application and emailed to you monthly.



A monthly look into key asset management and distribution trends through FLX Flow Insights.



Industry podcasts where FLX and special guests bring energizing topics to life.



Newsletters recapping key observations and insights from industry thought leaders.

Get a Sneak Peek: [Schedule a Demo](#)

# Asset Manager Membership

Choose the membership option best for your firm.

	Basic	Plus	Premier
Overview	Share information, ideas, and collateral, view exclusive insights, and access discounts.	Everything in Basic, <i>plus</i> engage, search, and track activity from wealth management firms and advisors.	Everything in Plus, <i>and</i> access competitive intelligence with FLX Analytics and deliver personalized content via FLX AI.

Community Engagement	Basic	Plus	Premier
<b>User Licenses</b>	2	10	25
<b>Network with Industry Professionals:</b> View profiles and network with industry professionals.	X	X	X
<b>Wealth Manager Community Pages:</b> As permitted by the wealth manager(s), access digitized, audited workflows to facilitate home office engagement and content sharing.		X	X
<b>Advisor Activity Tracking:</b> See which advisors are engaging with the content on your Community Page.		X	X
<b>Advisor Experience Profile Search:</b> Learn preferences of advisors in the community. Advanced reporting upcoming.		X	X
Your Community Presence	Basic	Plus	Premier
<b>Launchpad:</b> Your network homepage with two customizable news channels from a wide array of diversified financial services sources.	X	X	X
<b>Community Page:</b> Store and share firm information, product collateral, legal documents, and more.	X	X	X
<b>Intelligence Library:</b> Another avenue for sharing your thought leadership and insights. On-demand access to view metrics.	Unlimited	Unlimited	Unlimited
<b>Launchpad Showcase of Intelligence Content:</b> Homepage feature of your thought leadership content.		Eligible	Eligible
<b>Training:</b> Train your sales teams from a secure, private location.		X	X
<b>Product Availability Data:</b> An industry-wide view into where your products are available.		X	X

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Network Access and Benefits	Basic	Plus	Premier
<b>Intelligence Exchange:</b> View thought leadership and education from other FLX members.	X	X	X
<b>Solutions Exchange:</b> Access differentiated business services and perks such as media, PR, marketing, and more, saving you cost and time.	X	X	X
<b>Store:</b> Access to a curated selection at preferred pricing of best sellers and seasonal items for your firm or clients, branded with the logo of your choice.	X	X	X
<b>Exclusive Industry Insights:</b> Monthly flow data, industry insights, and podcasts.	X	X	X
<b>FLX AI:</b> Amplify your messaging by leveraging a tailored intelligence hub to effortlessly gather diverse insights and generate AI-facilitated content summaries to use for personalized, digital campaigns.		X	X
<b>FLX Analytics:</b> Market, product, competitive, and distribution intelligence on \$100T+ of global retail and institutional assets with visual analytics and workflow features to help your team strategize.			X*
Investment	Basic	Plus	Premier
<b>Annual Subscription</b>	\$500	\$5,000	\$19,000
Additional Investment Per Wealth Manager Community Page Access Granted**		\$500	\$500
Additional Cost Per 1,000 Advisor Members***		\$500	\$500

\*Can substitute two digital events or an additional 25 FLX AI licenses.

\*\*Each Wealth Manager Enterprise member grants access to their community pages to select asset managers. Charge will be administered upon wealth manager approval.

\*\*\*Up to a max of 10,000 incremental advisors annually.

Contact Us At [SOLUTIONS@FLXNETWORKS.COM](mailto:SOLUTIONS@FLXNETWORKS.COM) To Learn More.