

Revolutionizing Engagement with Financial Advisors and Wealth Managers

After decades of relying on an outdated wholesale model for interaction, it's time for asset managers, wealth management firms, and financial advisors to modernize and simplify their relationship. FLX's private network revolutionizes engagement for this community:

- Wealth managers and financial advisors access investment product and content, thought leadership, and shared services in a centralized destination, reducing noise and increasing productivity.
- Asset managers benefit from digitally interacting with an engaged audience and accessing modern, modular, and on-demand solutions that fit best with their stage of business and future goals.

FLX's Corporate Offerings: The Future of B2B Client Engagement

FLX offers modern sales, marketing, and service solutions for asset managers, delivering productivity, visibility, and savings.

Community Page

Efficiently share firm and product information with clients and prospects through one of the four Community Page options best for your company:

- **Community Page Basic*** : Create your firm's home page on the Investments Exchange to share product information and collateral, access the Solutions and Intelligence Exchanges and the FLX Store, and network with industry professionals.
- **Community Page Basic with Posting:** Includes the above, plus post your thought leadership and insights for wealth managers and advisors to view. On-demand access to how many views your posts have received.
- **Community Page Plus:** Includes the above plus post your platform availability for advisors to view, see how many advisors are engaging with your community page content, and access wealth manager corporate community pages, as permitted by the wealth manager.
- **Community Page Premium:** Includes the above plus view which advisors have interacted with your content and search advisor profiles to learn preferences and focuses. *Advanced reporting upcoming.*

FLX Intelligence

An aggregated, searchable, and trackable multimedia resource hub, broadening content reach and enhancing credibility

- Share unlimited written, video, or audio thought leadership content
- Build a dedicated showcase channel for videos, podcasts, and webcasts

Shared Personnel

Access the synthetic scale of a shared front office solution

- Strategic relationship development
- National accounts engagement
- Wholesaling
- Digital marketing
- Sales operations

**Minimum corporate requirement to join FLX's network.*

Data Vault

A full-service data distribution and automation platform, offering:

- Quarterly data reconciliation and publishing to 60+ databases
- Centralized and simplified due diligence questionnaire solution
- Cloud-based storage facility

Marketing Vault

Simplify workstreams with one location to warehouse, organize, and access sales and marketing content

- Hub for current product collateral, thought leadership, and legal documents, organized by category and as of date
- Archive for previous materials
- Centralized access for employees organizationally

Solutions

A curated marketplace of business solutions meant to make your business better and provide you with cost and time savings, including:

- Analytics
- Artificial Intelligence
- Marketing
- Lead Gen
- Benefits
- Public Relations
- Media
- ...and many more

FLX Networks offers:

Flexibility, Leverage and eXpertise to enable members to grow and sustain their business through solutions best suited to them

Flexibility

Extension of in-house capabilities
Target specific channels, firms, products, and geographies
Provide specific job functions
Tailor an approach that is best for your firm

Leverage

Decision makers
Product availability
Consulting resources to compete in any channel
To deliver a great user experience, regardless of size

eXpertise

Data and analytic trends
Seamless engagement
Noise reduction
Prospective buyers
Clients

Revolutionize your engagement with wealth managers and financial advisors today.
Contact us at information@flxnetworks.com to learn more.