

# Wealth Manager Membership



## Simplify and Modernize Partner Engagement

FLX's Wealth Management Suite delivers a singular destination to digitize and streamline asset manager communications, while unlocking access to leading technology solutions and professional services that can help your advisors execute on their strategies.

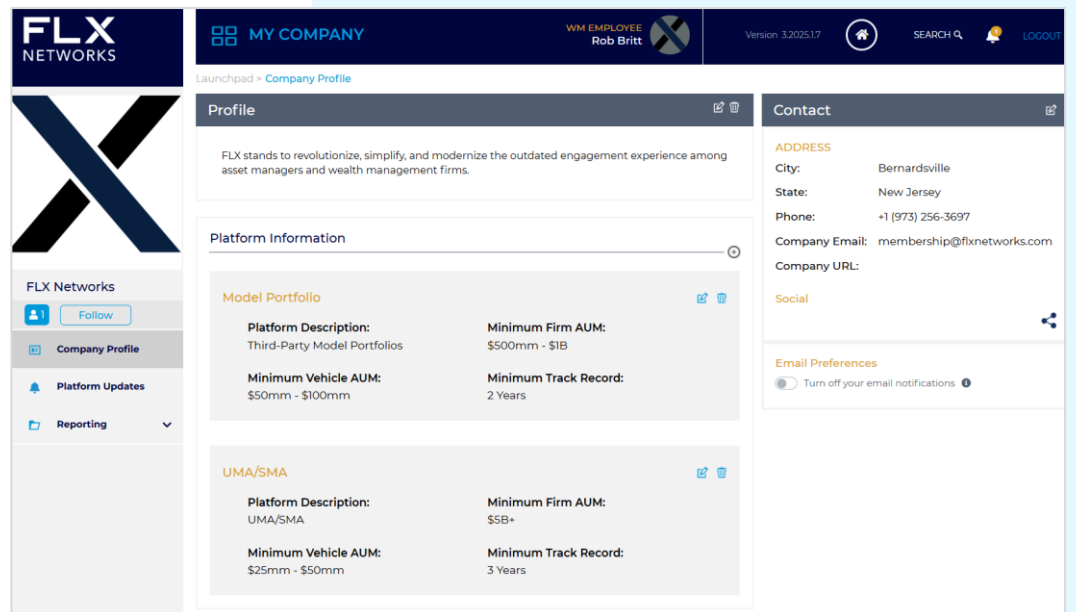
### The Network:

Your approved asset management partners can seamlessly:

- Share data and due diligence questionnaires
- Submit compliance approved marketing materials
- Learn your policies, news, and announcements
- Provide information
- Register for events

### Why use The Network?

- Reduce risk by digitizing workflows via a secure, cloud-based solution
- Increase efficiency by reducing the number of software subscriptions and digital destinations
- Minimize distractions from the deluge of daily emails, spreadsheets, and word documents
- Improve capacity by consolidating manual processes and workflows



### The Marketplace:

Your journey begins on the FLX Launchpad—your customized dashboard offering one destination for:

- Thought leadership highlights
- Real-time industry insights
- News and channels tailored to your content preferences
- Access to proprietary Exchanges



#### Investments Exchange:

Overviews and product information for hundreds of asset managers.



#### Intelligence Exchange:

View real-time insights and data and share proprietary thought leadership.



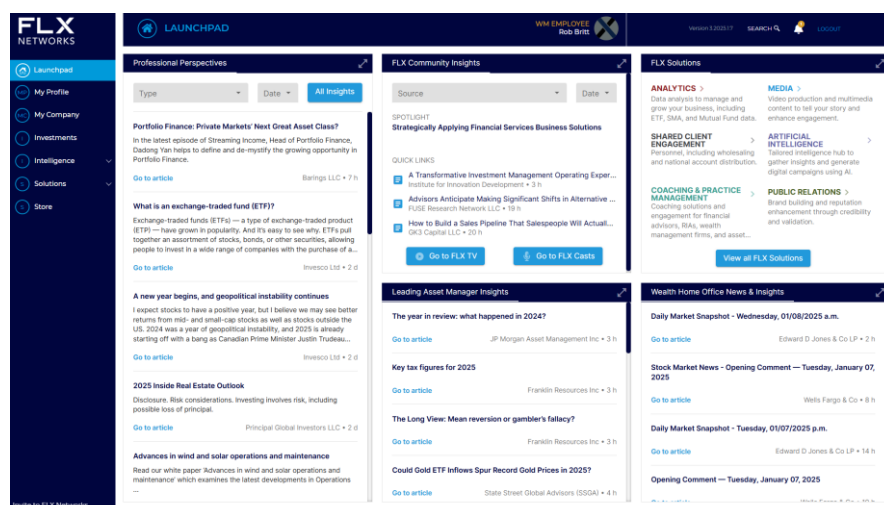
#### Solutions Exchange:

Professional business services and leading-edge technology.



#### Wealth Exchange:

Leverage your custom Community Page to efficiently share information and interact with your asset manager partners.



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

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Choose the membership option best for your firm.

The Network	Basic	Plus	Premier
<b>User Licenses</b>	2	5	20
<b>Community Page:</b> A central location for your firm overview, product requirements, and more.	X	X	X
<b>Network with Industry Professionals:</b> View FLX member profiles and preferences.	X	X	X
<b>Audit Log:</b> Easily access platform records to ensure all posts and files shared can be attributed to approved personnel.	X	X	X
The Marketplace	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>Store:</b> Curated selection of best sellers and seasonal items for your firm or clients, branded with the logo of your choice.	X	X	X
<b>Investments Exchange:</b> Overviews and product information for hundreds of asset managers.	X	X	X
<b>Intelligence Exchange:</b> Thought leadership, news, and data.	X	X	X
<b>Solutions Exchange:</b> Differentiated business services, technology, and perks.	X	X	X
<b>Wealth Exchange:</b> Efficiently share information and interact with your asset manager partners.	X	X	X
Solutions	Basic	Plus	Premier
<b>Asset Manager Relationship Portal:</b> Invite asset managers to engage with your personalized workflows and dashboard.	X	X	X
<b>FLX Assist:</b> A tailored intelligence hub effortlessly gathers diverse insights and generates content summaries.		X	X
<b>FLX Tuition Rewards:</b> Each licensed user receives 10,000 points annually to use against college tuition at over 445+ participating colleges and universities. [Powered by Sage Scholars / Sage CTB LLC]		X	X
<b>FLX Analytics:</b> Market, product, competitive, and distribution intelligence on \$49T+ of US retail and institutional assets with visual analytics and workflow features to help your team strategize.* [Powered by Broadridge]			X
Subscription	Basic	Plus	Premier
	\$3,000	\$7,500	\$25,000

\* FLX Analytics may be substituted for 30 additional licenses.

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## Additional solutions to consider



### **FLX Business Accelerator**

*Access coaching and practice management services for executives and financial advisors*

- Professional development coaching for executives and emerging leaders
- Collaborative advisor support through coaching and practice management
- Advisor events
- Educational program development



### **FLX Diligence Center**

**Powered by Dasseti**

*Streamlining operational due diligence and quarterly questionnaire collection*

- Collect data and streamline comparative analysis
- Monitor and communicate with managers more efficiently



### **FLX Marketing**

*Enhancing visibility, building brand*

- Audit: Brand and website
- Creation: Collateral and website
- Public Relations: Enterprise level or for individual advisor teams



### **FLX Media**

*Award winning video production solution for wealth management firms and their advisors*

- Branding
- Leadership and team stories
- Client communications



### **FLX Tuition Rewards**

**Powered by Sage Scholars/Sage CTB LLC**

*Innovative financial planning program for advisors to offer clients, driving positive client engagement*

- Clients receive 10,000 Tuition Reward points annually
- Each point equals \$1 of tuition discounts
- Points are redeemable at 450+ universities
- Rewards are not taxable, vest immediately, never expire, and can be gifted to any beneficiary

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