

Driving Productivity and Business Growth While Reducing Risk

Home office management of asset manager relationships requires regular coordination, data and document collection, and due diligence, often relying on emails, spreadsheets, and legacy SharePoint structures for execution and tracking.

FLX's Wealth Management Experience (WME) offers a better way.



Through personalized workflows within FLX's open-architecture network, each wealth manager invites their asset manager partners and prospective partners to engage virtually in the ways most important to them – to collect data and/or product collateral, communicate new policies, announce events, and more.

A Customized Network to Simplify and Centralize a Fragmented Ecosystem

Current Needs

WME's Solution

Increasingly strict oversight of asset manager partners



Centralized and permissioned access:

One central location for RFIs, multi-media commentary, and dynamic firm and product information

Data collection and storage



Intelligent document management:

An intuitive document management system to securely share, organize, retrieve, and archive files

Manual communications and coordination



Automated workflows and enhanced collaboration:

Digitally share platform eligibility criteria and policies, announce and track events, and communicate broadly via notification-based processes

Evolving business economics and fiduciary concerns



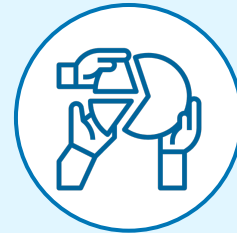
Engagement and solutions-based partner economics:

Manage partner/vendor programs for asset managers and solutions providers engaging in your network

WME offers tangible productivity enhancements and efficiency through:



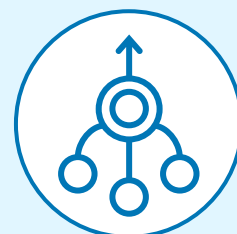
An intuitive document management system, enabling home offices and their vendors to securely share, organize, retrieve, and archive files with ease



Platform notifications and announcements to conduct due diligence, request information, and communicate news and events



Digitized workflows, eliminating inefficient processes, reducing key-person risk, and creating capacity



Consolidated administrative processes, workflows, and relationship management responsibilities



Controlled access for your advisors to approved content and other community members



An alternative path towards building revenue through FLX's Solutions Exchange

FLX Networks' Wealth Management Experience enables wealth management home offices to upgrade manual, inefficient, and outdated processes and achieve new levels of efficiency and operating scale.

**Simplify, modernize, and revolutionize your workflows today.
Contact us at information@flxnetworks.com to learn more.**



About FLX Networks

FLX Networks solves substantial pain points shared by asset managers, wealth management firms, and financial advisors. We've created a single destination for solutions, services, and engagement. Our members tailor their solutions based on their business needs and goals, offering productivity, cost savings, and growth potential.