

Wealth Management Experience

Driving Productivity, Reducing Risk, and Growing Revenue

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.

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



FLX allows wealth managers to easily invite asset managers to connect and engage virtually. They can share important information, like investment data or product materials, communicate policy updates, announce events, and collect requests for information.

A Customized Network to Simplify and Centralize a Fragmented Ecosystem

Current Needs

WME's Solution

Relationship management coordination



Centralized and permissioned access:

Virtualize administrative aspects of vendor management, while digitizing traditional email and spreadsheet heavy activities

Data collection, logging and storage



Intelligent document management and record:

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

Documented oversight of asset manager partners



Automated workflows and enhanced collaboration:

One central location for RFIs, multi-media commentary, and dynamic firm and product information; All logged and easily accessible

So much information in too many locations



Simplify via aggregation:

One location, one partner, one agreement reduces noise

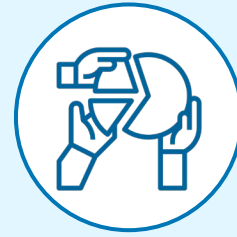
Wealth Management Experience

FLX
NETWORKS

WME offers tangible productivity enhancements and efficiency through:



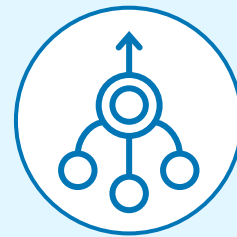
An intuitive document management system, enabling home offices and their vendors to securely share, organize, retrieve, and archive files with ease



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 revenue sharing 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.