

FLX Distribution 2021 Outlook Letter



Dear Clients, Partners, Colleagues, and Friends,

FLX Distribution hope this letter finds you safe and well.

2020 was certainly a once in a century type of year to launch FLX Distribution.

Bringing to life our vision of a revolutionary new ecosystem for the distribution of investment products would be a steep climb. In December 2019, we accepted that challenge. Taking on this challenge in what turned out to be a year defined by one of the greatest global healthcare crises in modern history was something no one could foresee.

Like everyone else, we adapted to this new world. We prioritized the health and well-being of our family, community, colleagues, and business partners. And we pushed forward with executing our vision – more strongly held than ever – and we found professionals and a marketplace excited to move forward with us.

In 2021 we will continue to evolve and adapt in our commitment to drive the FLX Distribution ecosystem forward.

The future is bright, in the next 12 months we will become a **RAMP**, a **R**esource and **A**sset **M**anagement **P**latform. We will enhance our leading edge distribution solutions while expanding or launching these important and exciting capabilities, all pointed at increase productivity and accelerate growth, while reducing friction to create excellent client experience:

- FLX Data Vault
- FLX Media
- FLX Intelligence
- FLX Capital Markets
- FLX Advisor Experience

Of course, we look back with gratitude on a year of milestones and accomplishments. We are humbled by the trust and confidence that our peers, fellow professionals, and institutions large and small have placed with our team and the transformative FLX business model.

Highlights of our first year:

- 16 asset management partners on board, backed by a deep pipeline
- 200-plus and growing investment distribution professionals in the FLX community
- 17 dedicated FLX team employees
- Top-tier Board of Directors and Advisory Board
- Strategic partnership with SS&C Technologies
- FLX Solution Providers (Media, PR, Professional services) selected, engaged, supporting client needs
- Launched FLX Data Vault
- Oversubscribed \$2.5 million equity fund raise
- Awarded ~~Money Management Institute/Barron's 2020 Disruption Award~~ for FLX technology that "will fundamentally alter the future delivery of advisory solutions."

In 2020, we engaged with hundreds of prospects, colleagues, and skeptics. We learned that the ideal distribution business model is one that addresses the industry's most pressing needs and that would be more adaptable and flexible than ever before. In this light, FLX created a new concept **DARP** – **D**istribution **A**t a **R**easonable **P**rice – to provide our partners access, flexibility, and scale.

In order to deliver DARP, FLX leverages the concepts of the "sharing economy" to offer a better way to implement businesses in the asset management industry. We focused on creating an organization driven by data, technology, and human connections.

FLX matches a focus on action with a willingness to evaluate our actions and decisions. As we have executed our plan, we continuously assess the results. We take time to better understand where our customers' needs are and pivot accordingly. Consequently, FLX Distribution has evolved to become the "advisors' advisor."

In the months ahead, FLX promises and plans to do what brought us here:

1. To do everything we can to help our partners – a pillar of our culture.
2. To continue to innovate and discover solutions that reduces our partners' business friction
3. To learn, act, assess and repeat as we know we will not get it right all the time

Where we have been and where we are going will increase the possibility of success for our asset management firm partners, distribution professionals, and the FLX Distribution vision.

Our journey would not be possible without partners, fellow entrepreneurs, team-work, and family. We thank everyone who has told us what we are doing wrong and what we are doing right. Without you nothing is possible, with you FLX will continue to shape and change a little slice of the world.

Please continue to keep innovating, keep growing, and stay strong.

Regards,
The FLX Distribution Team

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A network revolutionizing the engagement experience among asset managers, wealth management firms, and financial advisors.

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