

FLX DISTRIBUTION PARTNERS WITH THE PRIVATE TRUST COMPANY

Financial advisors can now access services of a leading trust services provider through industry's first RAMP

BERNARDSVILLE, NJ, June 23, 2021 – FLX Distribution – the **Resource and Asset Management Platform (RAMP)** revolutionizing the distribution experience among asset managers, wealth managers, and advisors – today announced that The Private Trust Company (PTC) is now accessible through the platform. The addition of PTC, a subsidiary of LPL Financial Holdings Inc. (Nasdaq: LPLA), offers financial advisors nationwide access to market-leading trust and family office services, further positioning FLX as the “advisors’ advisor.”

The administrative trust services of The Private Trust Company will be accessible to financial professionals in all 50 states via FLX’s full distribution capabilities covering RIAs, advisors, and home office professionals. PTC is one of the largest non-bank affiliated trust companies in the US and has been named to WealthAdvisor’s annual list of America’s Most Advisor-Friendly Trust Companies eight years in a row.

“Trust services are an integral component of an advisor’s wealth management offering. In today’s environment, offering trust capabilities creates an opportunity for advisors seeking to grow their client relationships by offering more added-value services. We look forward to expanding our network to serve the sophisticated needs of high-net-worth clients as well as offer families at all asset levels the ability to protect their financial legacies with the guidance of their preferred wealth advisor,” said Bethany Bryant, President, The Private Trust Company.

In just over a year since its founding, FLX Distribution has established itself as the leading, award-winning, most innovative independent distributor of asset management services nationwide. FLX has signed on over 30 asset managers, representing more than \$55 billion in combined assets under management, to its platform. In addition, FLX has attracted hundreds of independent, experienced distribution professionals to its community as it brings flexibility, fresh perspective, integrated services, and Distribution at a Reasonable Price to the marketplace.

“The Private Trust Company is a leading provider of advisor friendly trust services, and everyone at FLX is excited to be working with them to bring flexible trust services to a national, professional audience,” said Brian Moran, FLX Founder and Chief Executive Officer. “This strategic relationship also represents an important new stage in the evolution of FLX as we grow to include more than distribution of investment products and get closer to achieving our vision to be the advisors’ advisor.”

PTC is licensed in all 50 states under its 1995 national banking charter to serve as trustee, cotrustee, or agent for the trustee while specializing in delegating investment and relationship management to financial advisors. This model allows for clients and beneficiaries to utilize the experts of PTC to provide professional trust administrative services while outsourcing the investment management services to their chosen financial advisor.

Under terms of the ongoing strategic partnership between LPL/PTC and FLX, FLX will draw upon its full resources to build awareness of PTC’s capabilities and generate opportunities for advisors to strengthen relationships with their clients and prospects.

About FLX Distribution

Launched in December 2019, FLX Distribution is revolutionizing the distribution experience among asset managers, wealth managers, and advisors. We provide a technology platform – known as a Resource and Asset Management Platform (RAMP) – that delivers unmatched scale, flexibility, and access to a modular and on-demand experience. The FLX Distribution technology platform simultaneously empowers asset managers and distribution professionals to drive results and retain optionality. Powered by a combination of proprietary tech developments, and a stack of leading software providers, we have created a seamless exchange providing access to media resources, distribution solutions, corporate strategy, and business services.

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About Us

What is FLX Networks?

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

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