

# FLX names Head of Finance, adds to Marketing and Sales Teams – Caps Year of Robust National Growth in Response to Rapid Adoption by Asset Management Industry – News Release



*“FLX is changing how investment solutions are distributed and we are committed to investing in our business throughout 2021”*

BASKING RIDGE, NJ, FEBRUARY 12, 2021 – FLX Distribution, the first technology platform bringing together asset managers, distribution professionals, wealth managers, and advisors, today announced that it has appointed a head of finance and added to its marketing and sales teams, highlighting a year of rapid growth for the company as it changes how investment products are put in the hands of wealth managers and investors nationwide.

A sole proprietorship in January 2020, FLX expanded to five professionals by midyear, and today counts 31 total staff from coast-to-coast, commanding an average experience of 20+ years. This internal growth has come as FLX has achieved rapid adoption by the asset management, distribution, and financial intermediary sectors. Close to 20 asset management firms representing \$29 billion in assets under management now use FLX, while hundreds of distribution professionals nationwide are members of the FLX network. FLX recently received the Money Management Institute/Barron’s 2020 Disruption Award for its technology that “will fundamentally alter the future delivery of advisory solutions.”

“FLX is changing how investment solutions are distributed and we are committed to investing in our business throughout 2021,” said Brian Moran, FLX Founder and Chief Executive Officer. “FLX will stay ahead of the curve in meeting and anticipating the needs of our clients and the FLX community, and we expect a meaningful increase in headcount going forward as the FLX platform continues to be adopted. We welcome our latest hires to the FLX team.”

## Names Head of Finance, Expands Marketing and Sales Teams

FLX today said it appointed Chris Townsend as Director, Head of Finance; Dody Schroth as a Marketing Director; and Darin Thomas as a Portfolio Consulting Director. All are new roles and effective immediately:

- Chris Townsend is Director, Head of Finance. Chris has more than 25 years of experience in financial services. Prior to FLX, Chris was Head of Business Finance at AMG Funds and has held senior finance and accounting roles at Allianz Asset Management and Invesco. Chris earned a Bachelor of Science in Business Administration in Finance from The Ohio State University and is a Certified Public Accountant.
- Dody Schroth is a Marketing Director. Prior to joining FLX, Dody spent eight years in marketing and relationship management with various fintech firms catering to the wealth management business. Her most recent roles were as Director of Business Development and Performance Manager at Scivantage and Refinitiv, respectively. Dody has 25+ years of experience in the financial industry working at firms such as Convergenx and Credit Suisse. Dody earned a Bachelor of Arts degree from Skidmore College.
- Darin Thomas is a Portfolio Consulting Director focused on RIA wealth advisors. Prior to FLX, Darin spent more than 14 years in various roles at Wells Fargo Asset Management in both direct client service and intermediary distribution roles, most recently as an RIA Regional Consultant. Darin earned a Bachelor of Science in Economics and Political Science from the University of Wisconsin – Madison and is a Certified Investment Management Analyst (CIMA®).

## About FLX Distribution

Launched in December 2019, FLX Distribution is a financial technology company and Resource & Asset Management Platform (RAMP) focused on asset management distribution. Our vision is to be the premier, cost effective, and flexible distribution solution for asset managers to effectively access and engage with experienced and proven distribution professionals.

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 for sharing information and intellectual capital.

The FLX platform allows asset managers to create and track objectives, while distribution professionals gain access to the information and insights that drive advisor engagement. We are focused on understanding an asset manager’s existing business plans, current distribution capabilities, historical intermediary experience, investment capabilities, and sales and marketing goals to deliver a comprehensive distribution solution.

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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.

## Connect with Us



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