

FLX NETWORKS

QUARTERLY PERSPECTIVE

July 2024

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Brian Moran
FLX Networks CEO and Founder

As I reflect on the progress of FLX, I often think about the many strategic relationships we have entered. If you are a financial advisor or boutique asset manager, strategic relationships can be important in today's competitive market. Selecting the right allies to drive your business forward can make all the difference.

Five Lessons Learned From Selecting A Partner

#1 Cultural Fit: A strong cultural alignment fosters collaboration, reduces friction, and enhances the overall working relationship. If your partner's vision and culture resonate with yours, it's a positive sign that the partnership is well-chosen. In the case of FLX, we are building a transformative community that modernizes and simplifies the historical engagement model between asset and wealth management.

#2 Truly Aligned Goals and Expectations: The right strategic partners should share similar goals and expectations. This alignment should be clarified in advance to ensure that both parties are working towards common objectives and can collaborate seamlessly. I use the word "truly" because after the honeymoon period is up, memories, relationship participants, and marketplace dynamics can change. With aligned goals and expectations, you and your partner will work together through the inevitable ups and downs and celebrate successes together.

#3 Win-Win vs Win-Lose: A strong partnership should be mutually beneficial. Evaluate whether both parties are gaining value from the relationship. Value can come in the form of relative or absolute cost savings, access and visibility, insights and perspectives, or revenue growth. If your partners are trying to negotiate everything to a win-lose outcome, odds are they will be a challenged partner longer term. If your partners are willing to invest in joint initiatives and share financial risks, it demonstrates a strong commitment to the partnership's success.

#4 Effective Communication: Open and transparent communication is essential for any successful partnership. If your partners are proactive in sharing information and updates, addressing issues, and providing rationale feedback, it shows a commitment to the relationship. The same is true in reverse. You need to provide insights, information, and perspective regularly. Ultimately, effective communication fosters trust and helps navigate challenges and opportunities together.

#5 Endurance: The asset and wealth management industries have never been more competitive and complex. This complexity has led to significant volatility for businesses across the spectrum. Do your partners possess the flexibility and adaptability required to build a relationship? Are they organizationally and financially able to sustain a relationship? Partnerships thrive when the people leading the day-to-day engagement are there for the long-term and the partner has the financial means and resources to effectively deliver on their part of the relationship.

Looking at FLX's evolution, it's hard to imagine our progress without many of the strategic relationships we have been fortunate to develop. In fact, I believe one of our greatest strengths has been our ability to execute on these types of relationships. When I think about the reasons for this, it is due to our willingness to deliver on all the above, have open architecture platform that invites partnership through aggregation, and provide value to our members.

Looking Ahead

As we look forward to the second half of 2024, we continue to innovate, with transformative areas of growth at FLX that deliver value to our partners:

- **Virtualization of National Accounts** - Wealth Management home office teams will accelerate adoption of the Wealth Management Experience, reducing risk, increasing efficiency, and empowering their teams as well as Asset Managers' National Account professionals. Our next generation "partner portal" will drive countless hours of time savings while simultaneously reducing the volume of standard administrative questions wealth management firms receive from asset management partners.
- **Digitized Workflows** - wealth management firms will be able to seamlessly collect and access thousands of asset managers RFI and quarterly diligence templates through the FLX Diligence Center. Whether an RIA or a large wealth firm, we are reducing risk, improving productivity, and driving more knowledgeable research and product teams. Simultaneously, these innovations will allow asset managers to share their firm and product information with thousands of asset allocators!
- **Transforming the asset management sales process through the use of FLX Business Accelerator** - in a world where transactional selling is out of favor, the consultative value add sales process continues to drive results. FLX Business Accelerator drives the opportunity for asset managers to engage thousands of advisors and/or centers of influence with topics critical to their business, ultimately leading the asset manager to develop deeper and more informed relationships, leading to better results.

FLX is built to simplify, modernize, and revolutionize how you engage peers, information, insights, investments, and services through a single destination. In others, we are the ultimate partner network!

Thank you for your support.

Briau Morau

On-demand content and the ability to showcase your brand are essential to maintaining an omnichannel presence. FLX Media can help you deliver differentiated content to increase your visibility and convey key information about your firm and products.

Contact [Matt Novello](#), Head of FLX Media, to learn more.

The Latest from FLX and Our Community



[Pender Capital](#)



[FLX Networks- Simplify Your Digital Life](#)



[Veridien Global Investors](#)



[Strive Asset Management](#)

Friday Film Series: Catch up on thought leadership and key firm updates in this weekly series from CEO Brian Moran.



[Business Cycles](#)



[Reducing The Burden](#)

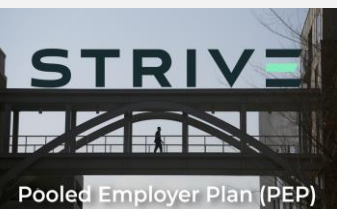


[FLX Premier Membership](#)



[Applying AI](#)

Product: Stay up to date on the various strategies and products our members offer.



[Strive PEP Pooled Employer Plan \(401K\)](#)



[Oak Hill Advisors: Why Company Size Matters in Direct Lending](#)



[SCG Asset Management Alternative Strategies Income Fund](#)



[Vineyard Global Advisors 1Q'24 Review & Outlook](#)

Latest Updates

- Introducing Professional Memberships, Redefining Engagement in Asset and Wealth Management. [Learn More](#)
- FLX Networks Partners with GK3 Capital to Provide Premier Digital Sales and Marketing. [Learn More](#)
- Introducing FLX Diligence Center allowing Wealth Managers to collect, organize, and analyze both quantitative and qualitative manager information. [Learn More](#)
- FLX Grows Network Membership and Aggregated Industry Intelligence. [Learn More](#)
- Access recordings of our recent CE webinars: "[A View From The Trenches](#)" (FLX Business Accelerator) and "[Understanding The Financial Impact of Student Loan Debt on Customers](#)" (FLX Tuition Rewards)
- FLX Media took home 2 [Telly Awards](#) (Gold & Silver) as well as 4 [Viddy Awards](#) (3 Platinum and 1 Gold) so far in 2024

You're Invited

- Earn CE credits through our upcoming Digital Events: '[Understanding Climate Portfolio Risks & Emission Data](#)' with Veridien Global Investors and '[Demystifying Artificial Intelligence](#)' with Bristol Gate Partners.
- Don't miss our upcoming FLX Networking Night (FNN) : Thursday, 8/8 from 5:30 – 7:30 pm in our historic Bernardsville, NJ office. [RSVP here](#)

Our latest upgrade delivers personalized content and delivers deeper member engagement insights.

Key Features:

Personalized Content Channels – Access the Insights You Need:

FLX members can now tailor your Launchpad and FLX AI content to match your specific interests and/or job function. This means no more sifting through irrelevant information – just the real-time insights you need, right at your fingertips.

Engagement Analytics for Asset Managers – Refine Your Lead Gen:

View engagement analytics for your thought leadership and news content to track and analyze member engagement.

Upgraded AI – Streamline Research, Analysis, and Content Creation:

Effortlessly create captivating content with FLX AI-generated summaries. Our enhanced model and refined prompt library allow you to quickly distill massive amounts of information and to generate compelling summaries tailored to your internal and external digital engagement strategy.

The future of content creation is at your fingertips – stay tuned for the exciting launch of our mobile experience!

Contact us at product@flxnetworks.com to schedule a personalized demo and customize your own Launchpad.

FLX Diligence Center

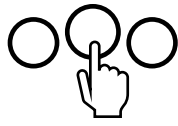
Streamlining the Due Diligence Data Management Process

FLX Diligence Center, powered by Dasseti, seamlessly collects and consolidates asset manager and service provider data within a digital platform, expediting and simplifying your due diligence process.

One Platform, Many Use Cases:



Due diligence



Fund selection



Report creation



Third party due diligence



Fund and manager monitoring



Secure document sharing



ESG and DEI data collection



Research and document management

FLX STORE

Choose from a curated selection of top-brand wearables, tech items, golf gear, and conference giveaways. Enjoy preferred pricing and elevate your brand with high-quality, affordable items!

As a FLX member, you have access to the FLX Store at no extra cost! Shop for year-end gifts and appreciation items for your clients, prospects, and employees.



Access insights, data, tools, and a unique financial benefit all in one centralized destination. Learn more [here](#).

	Freemium	Basic	Plus	Premier
Overview	<p><i>Get smarter, fast.</i> Access insights, investment ideas, and savings.</p>	<p><i>Grow your network.</i> Search, view, and connect with other members.</p>	<p><i>Save time OR save for college.</i> Get practical AI to create content or earn thousands of dollars towards college tuition.</p>	<p><i>All access benefits.</i> Our most comprehensive offering, including personalized channels on your Launchpad.</p>
Community Engagement				
Launchpad: Thought leadership highlights, real-time industry insights, business services, and news.	X	X	X	X
Community Profile: Build your profile within a dedicated asset and wealth management community.	X	X	X	X
Network with Industry Professionals: View profiles, learn engagement preferences, and network.		X	X	X
Community Events: Admission to FLX-sponsored industry events.			X	X
Network Benefits				
Intelligence and Investments Exchanges: Insights, investment ideas, and real-time market and business updates.	X	X	X	X
Solutions Exchange: Access differentiated business and technology services and perks, saving you cost and time.	X	X	X	X
Store: Access to a curated selection of custom-branded giveaways at preferred pricing.	X	X	X	X
Exclusive Industry Insights: Monthly flow data, industry insights, and podcasts.	X	X	X	X
FLX AI: Gather real-time diverse insights and generate AI-facilitated summaries for personalized campaigns from up to 10 channels of your choice.			Select One: AI or Tuition Rewards	X
FLX Tuition Rewards: Earn 10,000 points/year towards tuition for 450+ participating universities.				X*
Investment				
Annual Subscription	\$0	\$48	\$144	\$240