

Wealth Manager Membership



Simplify and Modernize Partner Engagement

FLX’s Wealth Management Suite delivers a singular destination to digitize and streamline asset manager communications, while unlocking access to leading technology solutions and professional services that can help your advisors execute on their strategies.

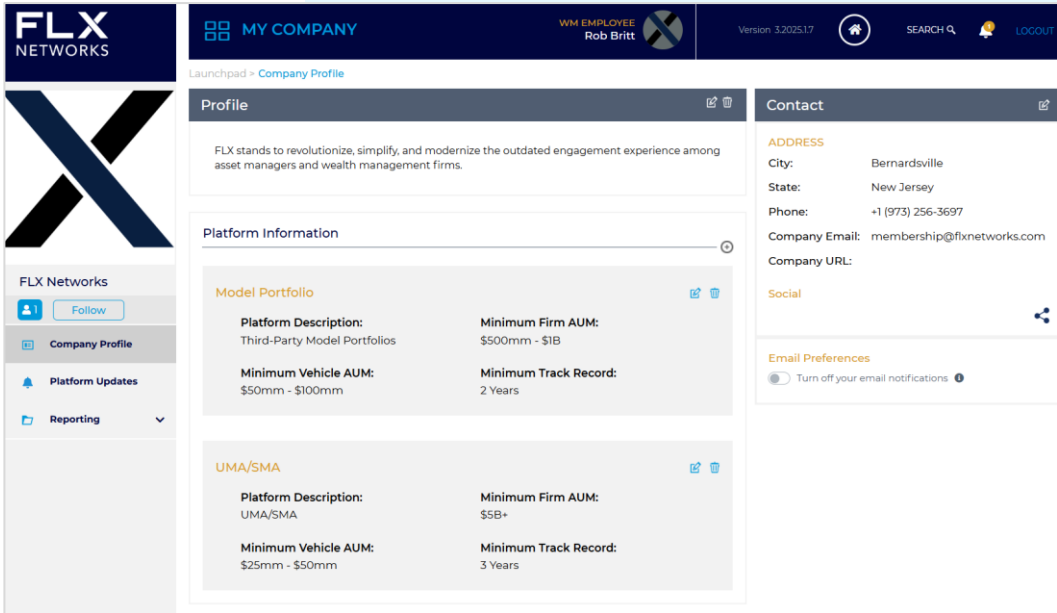
The Network:

Your approved asset management partners can seamlessly:

- Share data and due diligence questionnaires
- Submit compliance approved marketing materials
- Learn your policies, news, and announcements
- Provide information
- Register for events

Why use The Network?

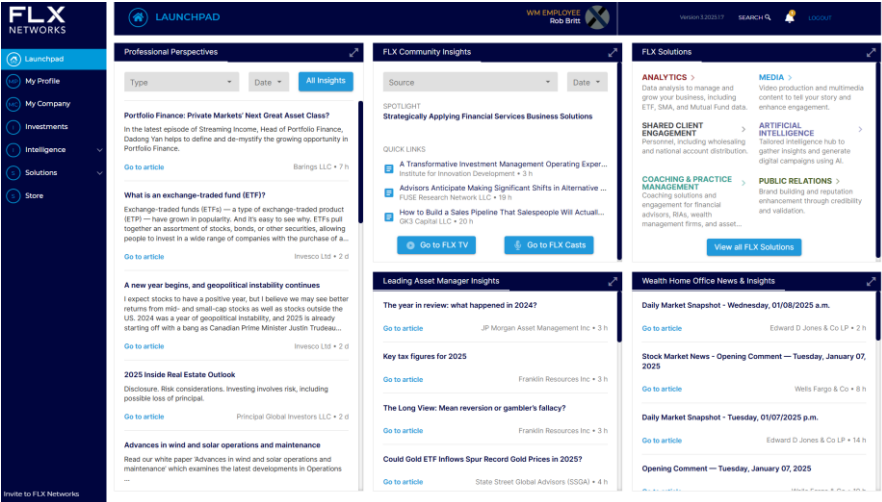
- Reduce risk by digitizing workflows via a secure, cloud-based solution
- Increase efficiency by reducing the number of software subscriptions and digital destinations
- Minimize distractions from the deluge of daily emails, spreadsheets, and word documents
- Improve capacity by consolidating manual processes and workflows



The Marketplace:

Your journey begins on the FLX Launchpad—your customized dashboard offering one destination for:

- Thought leadership highlights
- Real-time industry insights
- News and channels tailored to your content preferences
- Access to proprietary Exchanges



Investments Exchange:

Overviews and product information for hundreds of asset managers.



Intelligence Exchange:

View real-time insights and data and share proprietary thought leadership.



Solutions Exchange:

Professional business services and leading-edge technology.



Wealth Exchange:

Leverage your custom Community Page to efficiently share information and interact with your asset manager partners.

Get a Sneak Peek: [Schedule a Demo](#)

Wealth Manager Membership



Choose the membership option best for your firm.

The Network	Basic	Plus	Premier
User Licenses	3	12	25
Community Page: A central location for your firm overview, product requirements, and more.	X	X	X
Network with Industry Professionals: View FLX member profiles and preferences.	X	X	X
Audit Log: Easily access platform records to ensure all posts and files shared can be attributed to approved personnel.	X	X	X
The Marketplace	Basic	Plus	Premier
Launchpad: Your network homepage with two customizable news channels from a wide array of diversified financial services sources.	X	X	X
Investments Exchange: Firm profiles for hundreds of asset managers.	X	X	X
Intelligence Exchange: Thought leadership, news, and data.	X	X	X
Solutions Exchange: Differentiated business services, technology, and perks.	X	X	X
Wealth Exchange: Efficiently share information and interact with your asset manager partners.	X	X	X
Solutions	Basic	Plus	Premier
Asset Manager Relationship Portal: Invite asset managers to engage with your personalized workflows and dashboard.	X	X	X
FLX Assist: A tailored intelligence hub effortlessly gathers diverse insights and generates content summaries.		X	X
FLX Tuition Rewards: Each licensed user receives 10,000 points annually to use against college tuition at over 445+ participating colleges and universities. [Powered by Sage Scholars / Sage CTB LLC]		X	X
FLX Analytics: Market, product, competitive, and distribution intelligence on \$49T+ of US retail and institutional assets with visual analytics and workflow features to help your team strategize.* [Powered by Broadridge]			X
Subscription	Basic	Plus	Premier
	\$3,000	\$10,000	\$30,000

* FLX Analytics may be substituted for 30 additional licenses.

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Additional solutions to consider



FLX Business Accelerator

Access coaching and practice management services for executives and financial advisors

- Professional development coaching for executives and emerging leaders
- Collaborative advisor support through coaching and practice management
- Advisor events
- Educational program development



FLX Diligence Center

Powered by Dasseti

Streamlining operational due diligence and quarterly questionnaire collection

- Collect data and streamline comparative analysis
- Monitor and communicate with managers more efficiently



FLX Marketing

Enhancing visibility, building brand

- Audit: Brand and website
- Creation: Collateral and website
- Public Relations: Enterprise level or for individual advisor teams



FLX Media

Award winning video production solution for wealth management firms and their advisors

- Branding
- Leadership and team stories
- Client communications



FLX Tuition Rewards

Powered by Sage Scholars/Sage CTB LLC

Innovative financial planning program for advisors to offer clients, driving positive client engagement

- Clients receive 10,000 Tuition Reward points annually
- Each point equals \$1 of tuition discounts
- Points are redeemable at 445+ universities
- Rewards are not taxable, vest immediately, never expire, and can be gifted to any beneficiary

Contact Us At SOLUTIONS@FLXNETWORKS.COM To Learn More.