

# FLX NETWORKS

## QUARTERLY PERSPECTIVE

October 2024

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**Brian Moran**  
FLX Networks CEO and Founder

## **The Evolution of FLX Networks**

FLX has been nothing short of transformative. From the initial spark of an idea in my kitchen in January of 2019 to the formation of our team, the development of our product, our first members, and our first revenue, each milestone has been a testament to our dedication to trying to bring value to our members. As we have grown, I recognize how important creativity, adaptability, and positivity have been to our success.

## **Creativity is our Driving Force**

Creativity is at the heart of every successful company. It drives innovation, helps solve problems, and differentiates you from the competition. In these early stages, we've already seen how creative thinking can turn obstacles into opportunities. Whether it has been the focus on digitizing workflows, introducing a practice management solution, or rethinking how to best engage financial advisors on behalf of asset managers, we continue to grow, experiment, and innovate ways to deliver value to our members.

## **Adaptability in a Dynamic Environment**

Regardless if you're an early stage or established business in asset and wealth management, the industry landscape is dynamic, and adaptability is crucial for survival and growth. While we've encountered unexpected challenges and rapidly changing market conditions, our ability to pivot and adapt has been key to our resilience. Whether it's adjusting our business model, exploring new markets, or incorporating member feedback, staying flexible allows us to navigate uncertainty and seize new opportunities.

## **The Power of a Positive Mindset**

Maintaining a positive mindset is essential in the face of challenges. Positivity fuels our motivation, fosters a collaborative work environment, and helps us persevere through tough times. Celebrating small wins, supporting each other, and focusing on solutions rather than problems keeps our team energized and driven. A positive outlook not only boosts morale but also attracts a more engaged membership who believe in our vision.

As we conclude Q3 and look ahead, we are excited about:

- [Wealth Management suite](#) – we are going to take firms' outdated portals, siloed applications, and overwhelming spreadsheets and deliver a single, integrated collection of technology and business services that makes it easier for asset and wealth managers to share important information, collateral, and ideas.
- **The Home Office Platform** - leveraging the power of our platform, wealth management home office teams can digitize the historically administrative and cumbersome components of relationship management.
- **A Good Partner** – The result of achieving our vision, which is to simplify, modernize, and revolutionize an outdated engagement model, is to deliver value. Our definition of value has been and remains straightforward: deliver quality services and/or technology that increase efficiency and are cost-effective. Whether it is our award-winning [marketing](#) and [media](#), the highly regarded [Business Accelerator](#), or the innovative workflow technology, we continue to make progress on this commitment.

As we approach our 5-year anniversary this December, we're incredibly proud of how far we've come and everything we've achieved together. Most importantly, we're honored by the opportunity to serve our members. With our shared vision and continued dedication, we're excited for the next five years and the opportunities ahead to deliver even more value for those we serve.

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



[Great Lakes Advisors](#)



[Vident Financial](#)



[P&I- Why Should We Choose You?](#)



[P&I- What Are Your Clients Saying About You?](#)

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



[5 Things I Wish I Knew As A CEO](#)



[Messaging](#)



[Saying No](#)

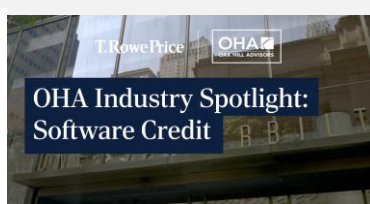


[Acting Now](#)

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[Hull Tactical Funds HTUS](#)



[Oak Hill Advisors: Industry Spotlight: Software Credit](#)



[Bristol Gate U.S. Equity Strategy, Aug '24 Update](#)



[Vineyard Global Advisors- Aug. '24 Halt Time Report](#)

## You're Invited

Mark your calendars for the **last two** FLX Networking Nights (FNN) of the year!

Taking place at our historic Bernardsville, NJ office on:

- Thursday, 11/7, from 5:30 – 7:30 pm [RSVP here](#)
- Thursday, 12/5, from 5:30 – 7:30 pm

## Latest Updates

- FLX Networks Introduces Solution to Streamline the Due Diligence Process for Asset and Wealth Managers. [Learn More](#)
- How AI Is Disrupting Our Industry, and What We Can Do About It- Brian Moran of FLX Networks. [Learn More](#)
- CEF Nexus 2024 Summit to Feature Industry Leaders in New York City. [Learn More](#)
- FLX Networks Named NJBIZ Leader in Digital Technology [Learn More](#)
- FLX Media took home 2 [Summit International Awards](#) for B2B Corporate Video. We took home Gold for [Pender Capital's](#) brand video & Silver for [Great Lakes Advisors](#) brand video!!!

In preparation for our mobile app launch in the coming weeks, we've strategically rolled out a series of smaller releases featuring minor updates.

### Enhancements:

#### August:

- Enhanced Product Search Capability:  
Added a Product Offerings section in AM Advanced Search, enabling filtering by expertise or product offerings.
- Easy Access to Timely Updates:  
The most recent WM posts will now appear at the top of the feed, giving partner firms and followers quick access to the latest updates. WM firms can still pin priority posts to keep them visible.

#### September:

- Enhanced User Profiles
  - Profile Picture:  
For new AM and WM employees, profile pictures will default to company logo, automatically updating if the logo changes (unless already customized).
  - Job Function:  
A new optional "Job Title" textbox has been added under "Job Function" in the Professional Experience section for all user profiles
- User Journey:  
Browser tabs now reflect the user's current journey and sections.

#### October:

- Engage with Posts and Updates:  
Users can now like updates, events, and announcements, increasing engagement and helping popular items stand out more.
- Highlight Firm Expertise:  
AM members can now customize expertise categories in their company profiles for a tailored presentation of their strengths.

Contact us at [product@flxnetworks.com](mailto:product@flxnetworks.com) to schedule a personalized demo and customize your own Launchpad.

## FLX Diligence Center

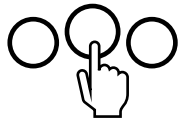
### Streamlining the Due Diligence Data Management Process

[FLX Diligence Center](#), powered by Dasseti, is a cloud-based tech solution that streamlines and revolutionizes the due diligence data management process for both asset and wealth managers.

#### 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

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