

## WEALTH MANAGEMENT FIRMS

**Accelerating growth through practice management, coaching, and value add**

FLX Business Accelerator provides wealth management firms with a comprehensive and customizable suite of coaching and practice management solutions, allowing you to choose specific services that effectively augment and supplement your existing initiatives.

### Comprehensive Coaching and Practice Management



Personalized coaching services and practice management solutions are designed to address your specific challenges.

FLX Business Accelerator provides the necessary tools and resources to help you fuel advisor growth and add operational efficiencies.

### Collaborative Advisor Support



FLX Business Accelerator believes in a collaborative approach, working hand in hand with you to help your advisors thrive.

With FLX Business Accelerator, you'll gain access to a network of support and expertise that will drive positive outcomes for your firm and your advisors.

### Hosted Advisor Events



Help your advisors grow and drive revenue by equipping them with tactical value-add ideas.

These branch, home office, or virtual events provide best practice ideas for your advisors, as well as allowing you to strengthen the relationships between your advisors and approved or pending asset managers on the platform.

## Equip Your Firm and Advisors with FLX Business Accelerator's Proven Three-Step Practice Optimization Approach

1

**Plan & Position:** Defining strategic direction and creating a business and marketing plan that aligns with goals and objectives

2

**Execute & Engage:** Implementing effective programs, campaigns, and tactics to execute the plan and engage with clients, prospects, and Centers of Influence (COI)

3

**Organize & Optimize:** Ensuring the practice is supported by the right team and infrastructure, managing resources effectively, and utilizing tracking systems for consistent execution