

Asset Manager Membership



Simplify and Modernize Engagement with Wealth Managers and Advisors

FLX’s Asset Manager Membership delivers a singular destination to engage with wealth manager partners while unlocking access to leading technology solutions and professional services to help you and your extended team execute on your goals.

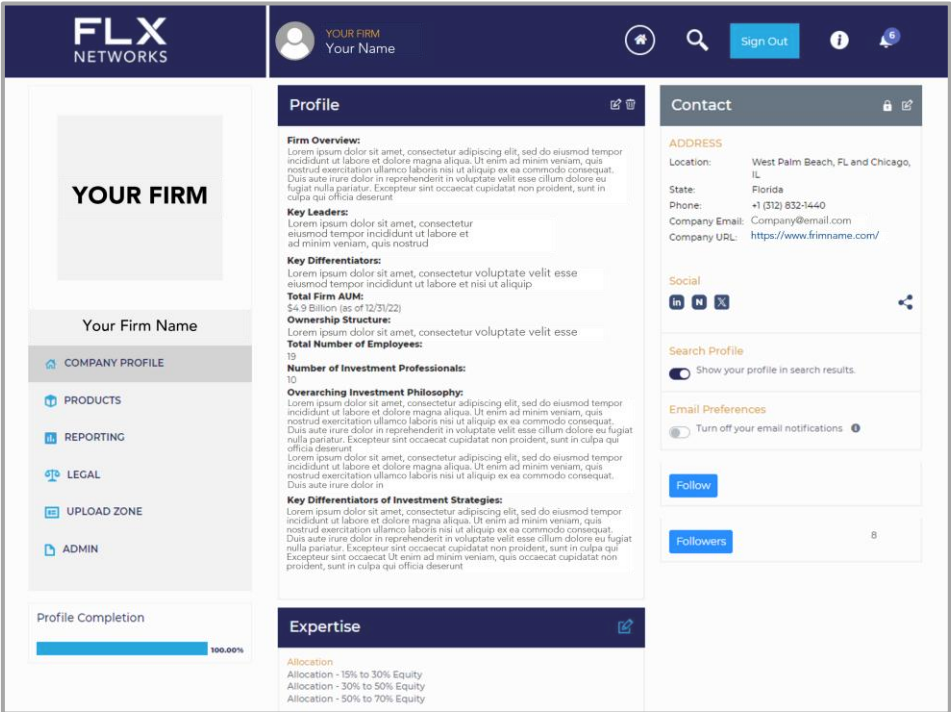
The Network

Membership gives you access to FLX’s network of asset and wealth managers, enabling you to:

- Share your investment content through your firm’s community page
- Streamline engagement with wealth managers
- Access actionable industry intelligence and data

Community Page – Your Storefront:

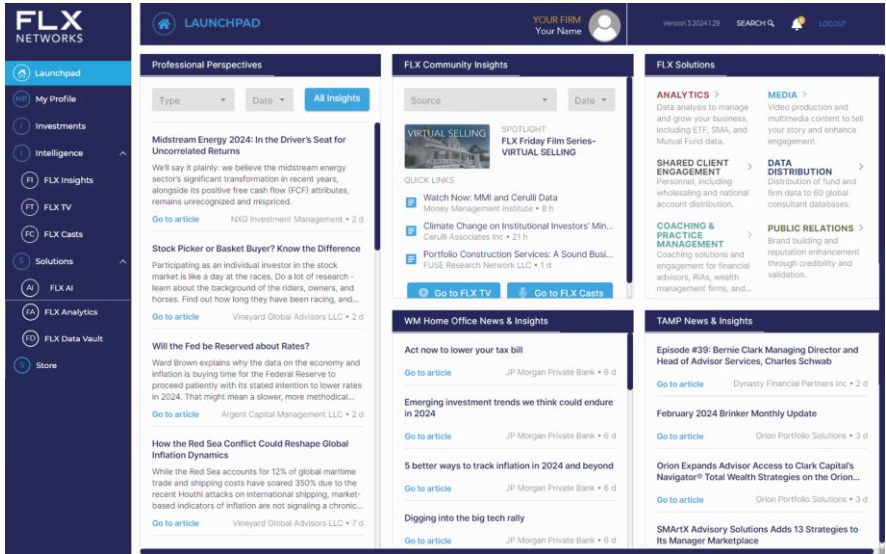
Your Community Page enables you to efficiently share information and interact with clients and prospects. It is a central location for your firm overview, product collateral, legal documents, training materials, and more.



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 the FLX proprietary Exchanges



Then, engage through FLX's Exchanges:



Wealth Exchange:

Engage, communicate with, and access your wealth manager partners in their custom portals (by invitation only.)



Investments Exchange:

Share your investment ideas, collateral, and company overview.



Intelligence Exchange:

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



Solutions Exchange:

Professional business services and leading-edge technology.

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

Asset Manager Membership



Choose the membership option best for your firm.

The Network	Basic	Plus	Premier
User Licenses ₁	1	6	15
Community Page Profile: Share firm information, legal documents, and more on a dedicated page in the Investments Exchange, discoverable by FLX’s membership of wealth management professionals.	X	X	X
Membership Profiles: View profiles and network with industry professionals:			
Wealth Management Firm Employees (from approved firms)	X	X	X
Non-Affiliated Members, including Advisors and Distribution Professionals		X	X
Engagement Analytics: Gain insights on users engaging with your Community Profile, Intelligence Exchange, Daily Newsletter (if featured), and/or Product Page. Access Membership Insights to track member activity across the network.		X	X
Platform Availability: Display an industry-wide view into where your products are available.		X	X
Community Page Products: Share your investment ideas, collateral, and company overview with wealth management professionals who visit your page.			X
Professional Perspectives: Launchpad may feature your thought leadership content for greater visibility to FLX membership.			Eligible
Network Emails: Promotional emails sent to thousands of industry professionals			Eligible

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Asset Manager Membership



Choose the membership option best for your firm.

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
Solutions Exchange: Access differentiated business services, technology, and perks.	X	X	X
Wealth Exchange: As permitted, access virtual relationship management solution, digitized operational due diligence and quarterly questionnaires, and democratized wealth platform insights. ²	Up to 2	Unlimited	Unlimited
Intelligence Exchange: Share your thought leadership and insights with on-demand metrics. View actionable news and insights from across the industry.		X	X
Event Center: Access proposed national, regional, and local events from wealth management firms who have approved your firm.			X
Select a Solution: + FLX Analytics + FLX Studio + Strategic Partner Data Programs + Additional 50 FLX User Licenses + Data Vault (up to 20 profiles)			Select 1
Subscription	Basic	Plus	Premier
2-year annual agreements. Discount available for 3-year commitments	\$5,000	\$15,000	\$30,000

1. Additional licenses may be purchased for an incremental fee, based on membership tier
2. Each active wealth manager grants asset managers access to the wealth managers community page. Upon greater than 2 approvals or the introduction of the FLX Diligence Center, an asset manager will automatically upgrade to Plus.

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