

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.

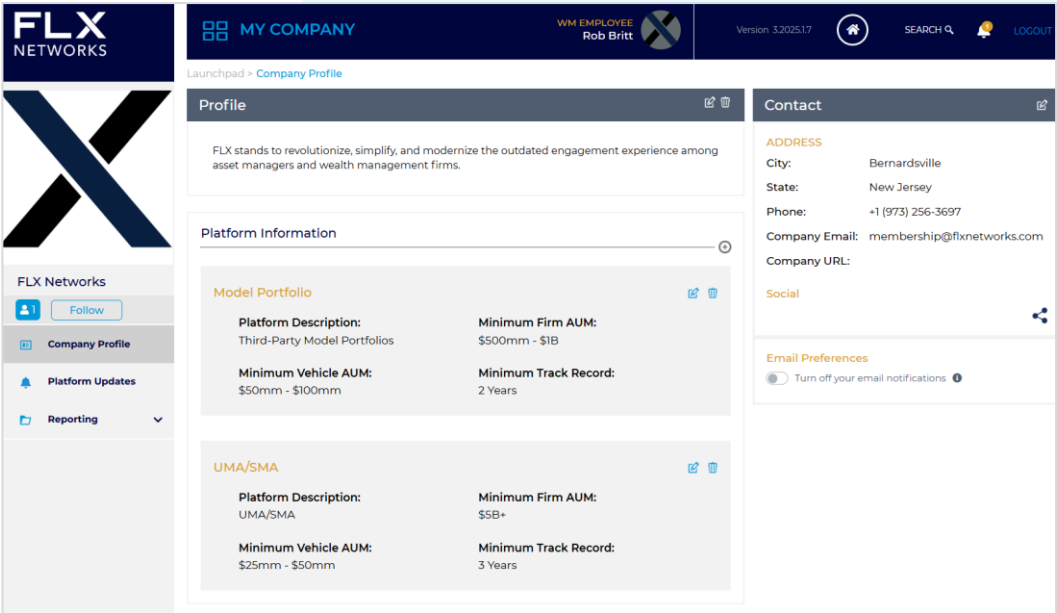
The Network:

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?

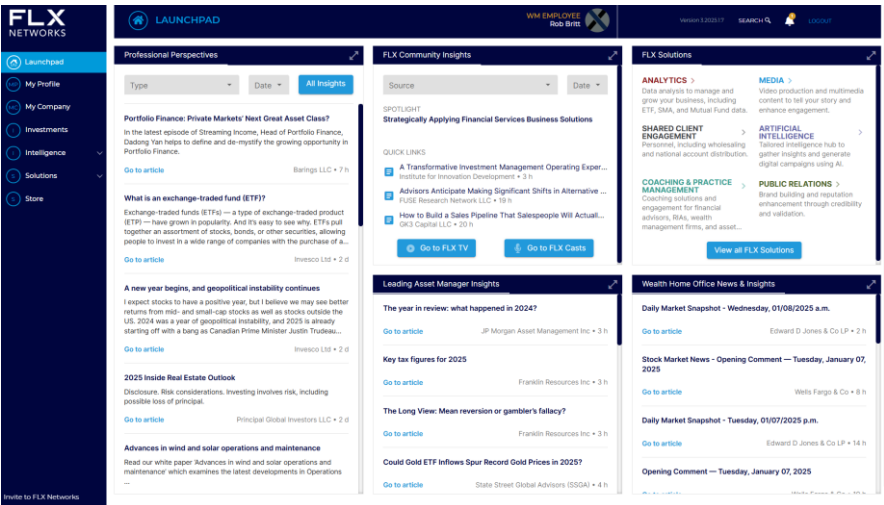
- Reduce risk by digitizing workflows via a secure, cloud-based solution
- Increase efficiency by reducing the number of software subscriptions and digital destinations
- Minimize distractions from the deluge of daily emails, spreadsheets, and word documents
- Improve capacity by consolidating manual 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	5	25	75
Community Page Profile: A central location for your firm overview, product requirements, and more.	X	X	X
Membership Profiles: View Asset Manager Employee profiles and network with industry professionals from your approved firms:	X	X	X
Engagement Analytics: Gain insights on users engaging with your Community Profile. Access Membership Insights to track member activity across the network.			X
The Marketplace	Basic	Plus	Premier
Launchpad: Your network homepage with customizable news channels from a wide array of diversified financial services sources.	X	X	X
Investments Exchange: View company profiles for hundreds of asset managers.	X	X	X
Intelligence Exchange: View actionable news and insights from across the industry.	X	X	X
Solutions Exchange: Access differentiated business services, technology, and perks.	X	X	X
FLX Store: Access a curated selection of best-selling and seasonal items, branded with the logo of your choice, at preferred pricing for your firm or clients.	X	X	X
Asset Manager Relationship Portal: Invite asset managers to engage with your personalized workflows and dashboard.		X	X
Events Center: Announce your proposed national, regional, and local events to your approved firms and identify potential sponsors.			X
FLX Studios: Record, edit, and distribute high-quality market updates, client communications, and thought leadership from anywhere. <small>*Additional fees apply for each video submitted for editing.</small>			X
Subscription	Basic	Plus	Premier
	\$5,000	\$15,000	\$30,000

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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 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.