

Shared Client Engagement

Helping Asset Managers Solve the Intermediary Engagement Challenge

THE CHALLENGE

Due to increased competition, fee compression, and product rationalization, asset managers face:

- Complexities navigating the intermediary retail market
- Potentially prohibitive costs of building an experienced distribution team of national accounts professionals and/or wholesalers
- Obtaining and nurturing a steady stream of leads to engage and convert advisors through digital marketing

THE PROCESS

FLX's detailed onboarding process, facilitated through the Distribution Speedometer, determines the optimal way to support your client engagement strategy. We use your existing business plans, current distribution capabilities, historical intermediary experience, investment capabilities, ultimate sales and marketing goals, and firm and product data as inputs.

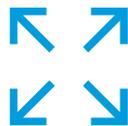
We maximize return on investment by selecting managers and products that are most viable, helping managers keep their client engagement strategies cost effective, flexible, and focused.

THE SOLUTION

FLX's Shared Client Engagement teams deliver unmatched flexibility, scale, and access through a modular and on-demand experience.



Flexibility: Select the client engagement team or offerings that aligns with your business needs and stage of growth, from lead generation to national accounts to wholesaling



Scale: Create "synthetic scale" to reinvigorate or better compete. Scale has been a driving objective for many in the asset and wealth space. By joining a community and leveraging the shared resources and buying power of the community, asset management firms or even business units can forge a path to growth



Access: FLX's experienced distribution professionals leverage the platform's diverse product set and can gain and maintain steadier access to advisors and home office gatekeepers in comparison to single asset class specialists.

WHY FLX NETWORKS?

FLX Networks solves substantial pain points shared by asset managers, wealth management firms, and financial advisors. We've created a single destination for solutions, services, and engagement. Our members tailor their solutions based on their business needs and goals, offering productivity, cost savings, and growth potential.



Solutions for Growth



Reduced Fixed Costs



Perpetually Relevant



Resource Alignment

Schedule a [DEMO](#) To Learn More.

Shared Client Engagement

WHOLESALE

Advisor Consulting Directors (ACDs)

National Team-Based Coverage

FLX's ACDs are tenured, well networked sales representatives and are set up to represent a diverse and distinct set of asset class strategies throughout the country. The sales teams' incentives are driven by Key Performance Indicators, including activities and meetings per manager, thus helping to ensure incentive to raise assets across all the asset managers they represent. The ACDs access leads through targeted and defined content and promotional activities, including award-winning videos, public relations, digital events, lead-gen emails, and social media promotion.

ACD and FACD Support:

Sales Reporting: By partnering with a shared client engagement sales team, you access transparent and real time sales reporting powered by Broadridge, accessed directly through your FLX Community Page, including:

- 30-day and 120-day activity reports by salesperson
- Opportunity pipeline

Franchise Advisor Consulting Director (FACD)

A More Flexible Approach

FLX offers individual ACD's to meet asset managers specific wholesaling needs. FACDs are individually unique in their own market with relationships, firms/channel coverage, and product knowledge and experience. Each can work with a finite list of managers, typically a maximum of three. This allows managers to complement their existing team or create a custom solution. FACDs leverage FLX infrastructure including a robust CRM, compliance oversight, and marketing activity performed on behalf of each asset manager they represent. FLX, the FACD and the Asset Manager will work together to optimize a mutually beneficial operational relationship.

Shared Client Engagement Team Targets:

- Minimum firm AUM: \$100 million
- Minimum product AUM: \$50 million

ACD/FACD Team Considerations:

- Platform and/or custodian availability
- Regional coverage
- Track record
- Performance

NATIONAL ACCOUNTS

Platform Relationship Directors Team (PRDs)

Product Placement and Research Relationship Management

FLX's national accounts team comprises specialists with deep relationships at wirehouses, IBDs, RIA aggregators, banks, and sub-advisory firms. Each PRD represents the full suite of FLX products, consolidating and simplifying engagement for product and research due diligence teams. This team manages and shares pipeline reporting monthly with the asset manager. The PRDs access leads through targeted and defined content and promotional activities, including award-winning videos, public relations, digital events lead-gen emails, and social media promotion.

LEAD GENERATION

Supplement your shared or in-house sales efforts with our state of the art, lead generating digital marketing offerings

Digital Distribution Plus

Through a year-round and omni channel approach to content generation including written interviews, produced videos, and webinars, FLX attracts advisors to your firm and investment capabilities. Integrated email campaigns and social media promotion nurture advisors through the marketing funnel into qualified sales leads, to be followed up on by two schedulers booking qualified meetings for your internal team.

Lead Generation and Scheduling

A next generation business and technology solution allowing you to partner with a virtual representative that will qualify leads and schedule meetings for your sales team.