

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.

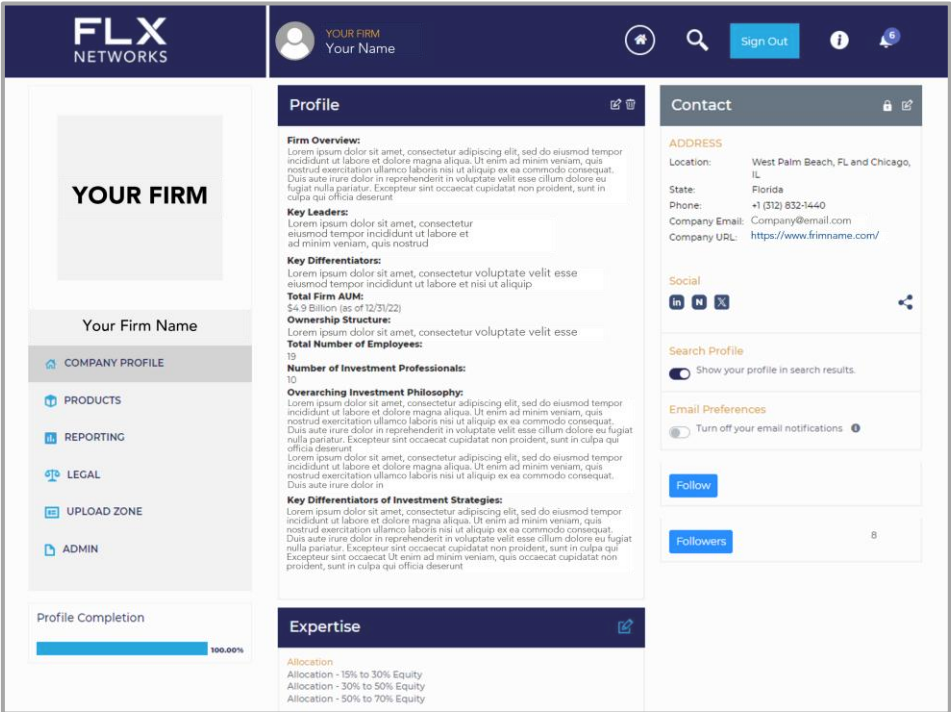
The Network

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:

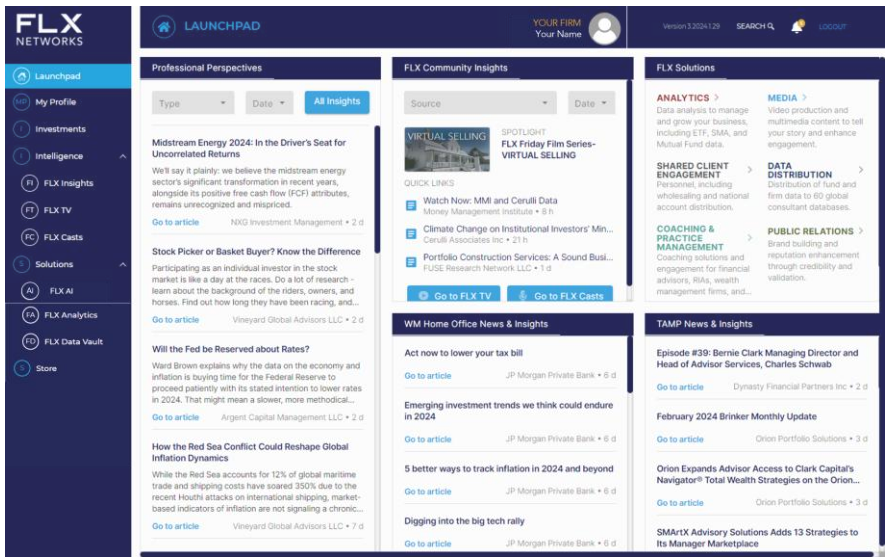
Your Community Page enables you to efficiently share information and interact with clients and prospects. It is a central location for your firm overview, product collateral, legal documents, training materials, and more.



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	4	15
Community Page: Store and share firm information, product collateral, legal documents, and more.	X	X	X
Network with Industry Professionals: View profiles and network with industry professionals.	X	X	X
Activity Tracking: Learn which visitors are engaging with the content on your Community Page or the Intelligence Exchange.		X	X
Advisor Profile Search: Learn preferences of advisors in the community. Advanced reporting upcoming.		X	X
Featured Thought Leadership: Launchpad may feature your thought leadership content.			Eligible
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
Store: Access to a curated selection at preferred pricing of swag for your firm or clients, branded with the logo of your choice.	X	X	X
Investments Exchange: Share your investment ideas, collateral, and company overview with wealth managers.	X	X	X
Intelligence Exchange: Share your thought leadership and insights with on-demand metrics. View actionable news and insights from across the industry.	X	X	X
Solutions Exchange: Access differentiated business services, technology, and perks.	X	X	X
Wealth Exchange: As permitted by the wealth manager(s), access digitized, audited workflows to facilitate home office engagement and content sharing. _{2,3}	Up to 3	Unlimited	Unlimited

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Asset Manager Membership



Choose the membership option best for your firm.

Solutions	Basic	Plus	Premier
FLX Assist: A tailored intelligence hub to effortlessly gather diverse insights and generate content summaries.		X	X
FLX Tuition Rewards: Each licensed user earns 10,000 annual credits towards college tuition at over 445+ participating colleges. [Powered by Sage Scholars / SAGE CTB LLC]		X	X
FLX Analytics: Market, product, competitive, and distribution intelligence on \$49T+ of US retail and institutional assets with visual analytics and workflow features to help your team strategize. [Powered by Broadridge] ⁴			X
Subscription	Basic	Plus	Premier
	\$3,000	\$10,000	\$30,000

- 1. Additional licenses may be purchased for an incremental fee, based on membership tier
- 2. Each active Wealth Manager member grants Asset Managers access to their community pages. Asset Managers with Basic Membership must upgrade to Plus if more than 3 Wealth Managers grant access.
- 3. Some workflows that may be requested or required by a Wealth Manager, such as the FLX Diligence Center which streamlines due diligence and data management, require a Premier Membership.
- 4. You may substitute FLX Analytics for 30 additional licenses.

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