

Knowing-By-Doing

THE CHALLENGE

Many consultants provide well-researched and cogent strategies. However, few of these consultants have the executional experience of truly knowing what it takes to successfully implement their strategies.

THE OPPORTUNITY

Knowing-by-doing is FLX Consulting's key differentiator. At FLX Consulting, we understand that having a deep and knowledgeable distribution team is a crucial component. We also know that sometimes it is more than just getting "at-bats" with decision-makers. FLX Consulting draws from the experience of individuals that have created and executed strategies from scratch, directed investment responsibility on over \$200 billion in assets and served on fund boards. We have the experience and know-how to take a deep dive into your processes, structure, strategies, return profile expectations, fees, and the best approach with professional buyers.

FLX Consulting is a revolutionary way for asset managers to receive consulting services that are truly aligned with their distribution partners. The practice will focus on product and distribution-related challenges and opportunities on behalf of our clients, and for multi-dimensional engagements, FLX Consulting will collaborate with FLX's network of specialized consulting firms and resources in this space. We will play a coordinating role to deliver a cost-effective solution with FLX as the primary point of contact and accountability.

FLX Consulting can work on a one-off basis or as a part of a broader service-based retainer model for your firm. One-off approaches will be priced on a per project basis and will encompass factors such as scope, depth, and hours. For a more tailored approach, we offer packages that include monthly, quarterly and annual reoccurring deliverables, while also having the ability to incorporate "on-demand" services.



FLX Consulting Service Examples

- Benchmark Analysis and Change Execution
- Fee Analysis
- In-depth Competitive Analysis
- Market Insights
- Portfolio Manager Pitch Review
- Product Creation
- Product Rationalization
- Track Record Incubation

Client Benefits

- Product readiness geared towards achieving successful distribution efforts
- Access to a team of highly experienced market leaders with backgrounds in Product Management, Business Development, Investments and Operations
- Cost efficient and focused efforts tailored specifically to your firm
- One firm and one point of contact designed to holistically address firm goals, both now and in the future