

Case Study: Fundamental Manager Pursues Panoramic Partnership for Distribution, Marketing, and Technology Services

The Challenge Despite over two-decades of industry tenure and a dedicated internal team, resource limitation curtailed this asset manager's influence.

The Current State

Goal:
Grow brand visibility and client engagement.

Employees: 10

AUM: \$1.5 billion

Budget: \$600,000

Presence: United States

Investment Capabilities:

Data-driven, fundamental allocation strategies

Channels:

Retail

Our Solution



Advisor and home office engagement via shared sales, national accounts, marketing, and public relations teams



Lead gen and exposure via targeted emails and social media posts



Brand and product content creation via dedicated in-house marketing and media personnel



Product screening via efficient data distribution



Access to leading broker dealer platform through strategic partnership

The FLX Advantage



Cost Savings

- 70% cost savings on fixed distribution versus in-house personnel, equipment, subscriptions, and licenses
- \$150,000+ annual savings in B/D partnership program and conference sponsorship



Growth Potential

- Exposure to 7,000+ prospects at three industry conferences
- 250,000 emails sent to targeted advisors and home office contacts within six months
- CNBC placement within first month of public relations



Productivity

- Internal focus on expertise with limited distractions
- Streamline retail distribution team management by removing administrative burdens

FLX
NETWORKS

Contact us:

