

Case Study: Established, Global Asset Manager Seeking to Break into US Retail Market with Alternatives

The Challenge

Leadership invested in this goal by building a dedicated internal team. Despite the company's established and respected institutional presence, results were not as expected after five years.

The Current State

Goal:

Grow alternatives business within US retail channel.

Employees: 1,800

AUM: \$300 billion+

Budget: \$1 million+

Presence: Global

Investment Capabilities:

- Public and Private Fixed Income
- Public and Private Equity
- Real Estate
- Alternatives

Channels:

Primarily Institutional

Our Solution



Specialized and concentrated alternative sales team and marketing personnel driving advisor outreach



Home office engagement via national accounts and marketing



Lead gen and exposure created via regularly promoted emails and social media posts



Product screening via efficient data distribution



Brand, product, and people promotion via videos, podcasts, digital events, and conference sponsorships

The FLX Advantage



Cost Savings

- 75% cost savings on distribution compared to a full-time team
- Reduce tangential costs of maintaining a team
- Cost savings enable resource reallocation for growth initiatives



Growth Potential

- 250,000+ emails sent to validated and targeted advisors and home office contacts in 2023 alone
- 10X increase in asset manager meetings YoY
- 9X increase in sales YoY



Productivity

- FLX platform accelerates engagement with intermediaries
 - Introductory meetings with leading Broker/Dealer firms
- Eliminate administrative burdens of retail distribution