JOIN THE FLEXGEN℠

FlexGen Advisors℠ are a new generation of financial services professionals. They are growing their businesses by rethinking talent recruitment, client acquisition, and fee structures. They're meeting the emerging needs of the market and building long-term relationships by redefining their service models.

94%
FlexGen Advisors grew their business last year

They outpaced their peers by **10%** in AUM & **5%** in growth

Top 3 growth drivers

- **Proactivity**
  99% believe that a great client experience requires being proactive
- **Technology**
  96% rely on technology to elevate their service
- **Client experience**
  94% believe success depends on a great client experience

What are common characteristics of a FlexGen Advisor?

- 96% love to learn
- 95% are optimists
- 87% challenge conventional thinking
- 82% embrace change

Advisors realizing the most success are

- Meeting the needs of underserved markets
- Utilizing technology to future-proof client relationships
- Providing interactive, collaborative client experiences

How are FlexGen Advisors attracting and retaining clients?

- 93% provide clients with a collaborative experience
- 91% see planning as a differentiator
- 81% offer unique service models
- 75% have mapped out their client experience
- 64% focus on strategies to support multiple generations

eMoney

FlexGen Advisors target underserved segments

- 88% focus on H.E.N.R.Y.s
- 88% focus on Millennials
- 55% focus on women
- 45% focus on minorities

FlexGen Advisors apply business practices that attract talent

- 92% believe a collaborative culture attracts advisors
- 86% recognize the importance of a fun work environment
- 86% focus on diversity to build a strong culture
- 80% support flexible work options

FlexGen Advisors value a strong foundation and reputation

- 97% are confident they can manage increased regulation
- 94% are adaptable to changes in the marketplace
- 89% adopt new technology to keep their practices current
- 72% have an optimized website
- 65% have a marketing plan in place

Join the FlexGen!

See how eMoney can help.

Source: 2018 Fidelity Financial Advisor Community – FlexGen Study

eMoney collaborated with Fidelity on the development of the survey used in the FlexGen Research Study. The study was an online blind survey (neither eMoney or Fidelity were identified) and was fielded from July 30th through August 8th, 2018. Participants included 458 advisors who manage or advise upon client assets either individually or as a team, and work primarily with individual investors. Advisor firm types included a mix of banks, independent broker-dealers, insurance companies, regional broker-dealers, RIAs, and national brokerage firms (commonly referred to as wirehouses), with findings weighted to reflect industry composition. The Study was conducted by an independent firm not affiliated with eMoney or Fidelity Investments.

eMoney