

# FLEX Connect

THERE FOR THE **ADVISORS**  THERE FOR THE **JOURNEY**

## INTRODUCING SOWELL'S FLEX Connect

Like a chain, a system is only as powerful as its weakest link. With that thought in mind, Sowell Management created **FLEX Connect**, our purpose built end-to-end solution designed to empower financial advisors through every stage of the wealth management life cycle.

An advisor's time is money, and many advisors spend a lot of time on non-revenue-generating and non-client facing activities. Sowell's goal is to help you minimize the amount of time you spend on low-return activities. We believe the best way to leverage your time and energy is through technology.



**FLEX Connect** offers advisors an open architecture platform that utilizes cutting-edge, sleeve-level Unified Managed Account (UMA) technology, enabling advisors to allocate a broad selection of Mutual Funds, ETFs and Individual Securities, as well as Sowell Models and a curated marketplace of Third-Party Asset Manager Models (SMAs) — all in a single account!

It is an intuitive, integrated cloud-based technology — a comprehensive single platform — that seamlessly connects you to all the resources you require to manage your client's wealth management needs. **FLEX Connect** is the innovative solution that streamlines the wealth management cycle — making it easier and more efficient for you to be exceptional.

**FLEX Connect**  
Your single solution for a client's wealth management life cycle.

## CONTACT

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