

eCIO Partners with FLX Distribution

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Financial advisors can now access a platform to revolutionize the way they communicate and interact with their clients

Madison, WI, August 31, 2021 — eCIO, the company that created the revolutionary [eVestech](#) platform, today announced that it is excited to partner with [FLX Distribution](#) and is offering its industry-leading financial advisor communication technology on the FLX Solutions Provider platform.

The eVestech platform leapfrogs the typical investor portal and enables financial professionals to engage with their clients personally and frequently through a scalable virtual communication hub. Capitalizing on major trends impacting how clients expect to be serviced by their investment professionals, the eVestech platform allows advisors to engage in secure 2-way interactive messaging, provide video updates and reporting, effectively schedule and host virtual meetings, share customized account reviews, deliver performance reports, and store all client documentation in a personalized vault. Analytics help advisors measure and respond to their clients' level of engagement so they can offer clients what they want, when they want it, the way they want it.

“The way clients expect their financial advisors to serve them has been changing rapidly. The Covid-era moved forward digital transformation by years and many advisors are behind in adapting their business to meet client expectations. eVestech is the modern solution for advisors who want to scale their delivery of high touch, personalized communication and service” said Rob Roquitte, founder and CEO of eCIO. Through advanced communication tools to stay close to their clients, advisors drive higher rates of retention and more referrals.

The eVestech platform supports service to over 1,200+ investors. Through integrations with custodians, performance reporting providers and other technologies, an advisor can simplify the delivery of information to clients and stay at the center of all aspects of his clients' investment programs.

“We are excited to partner with FLX Distribution, another revolutionary force in the wealth management market in offering the eVestech platform to the advisors they serve” said Roquitte.

About FLX Distribution

Launched in December 2019, FLX Distribution is revolutionizing the distribution experience among asset managers, wealth managers, and advisors. We provide a technology platform — known as a Resource and Asset Management Platform (RAMP) — that delivers unmatched scale, flexibility, and access to a modular and on-demand experience. The FLX Distribution technology platform simultaneously empowers asset managers and distribution professionals to drive results and retain optionality. Powered by a combination of proprietary tech developments, and a stack of leading software providers, we have created a seamless exchange providing access to media resources, distribution solutions, corporate strategy, and business services.

About eCIO

Launched in late 2019, eCIO started as an RIA dedicated to bringing institutional-quality, low-cost investment solutions to the underserved small nonprofit market. Through our revolutionary eVestech platform, we provide virtual, customized, high touch client service to the dozens of investment committees we serve. Other investment firms asked to license our platform so we now offer eVestech as a white-labeled client reporting and communication hub to consultants and advisors for a monthly subscription fee. It's a platform for advisors built by advisors to help grow and scale their business through high touch, efficient client engagement.