

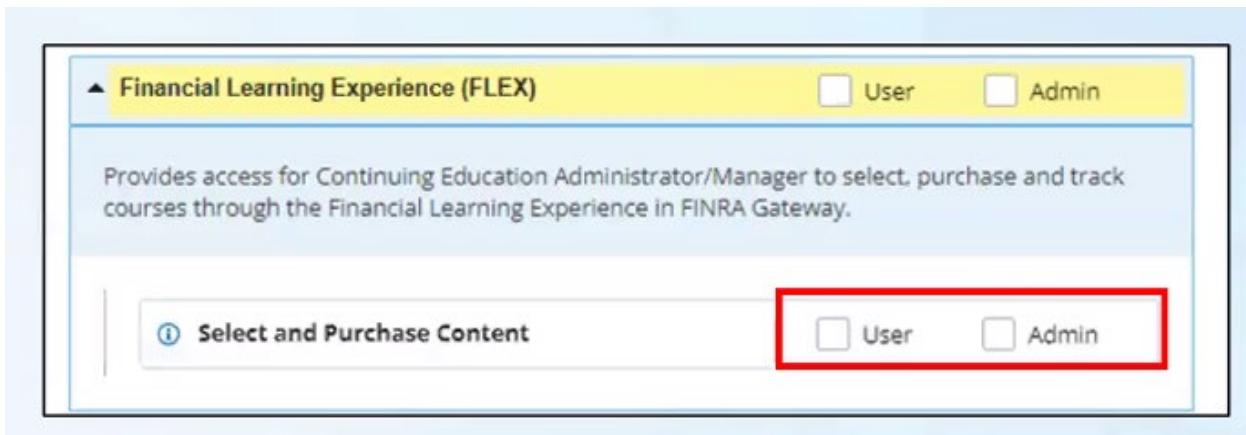
Quick Reference Guide – Accessing FLEX on FINRA Gateway

The information provided in this document is intended to provide a quick guide for CE administrators on how to get access to FLEX on FINRA Gateway.

Enable FLEX Entitlement

Below are instructions to gain access to the FLEX dashboard for the first time in order to subscribe. For any questions, please contact flex@finra.org.

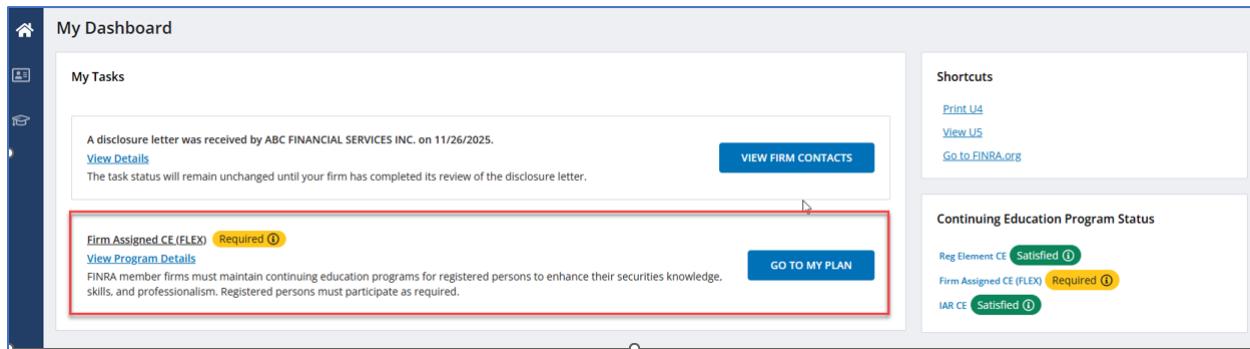
1. To gain access to the Financial Learning Experience (FLEX) dashboard within the FINRA Gateway, please contact your firm's Super Account Administrator (SAA). They can grant you the entitlement role for Financial Learning Experience (FLEX). When editing entitlements, FLEX is the last privilege available to select on the list.



2. Your SAA can assign the entitlement for "Select and Purchase Content" under the Financial Learning Experience (FLEX) by checking the box for "User" and/or "Admin." Types of entitlement roles:
 - User: Can select and purchase content
 - Admin: Can grant access and create accounts, but not select and purchase content
3. Once granted access to the dashboard, the CE Admin can take the following actions. For further instructions, please view the hyperlinked Quick Reference Guides:
 - [Access the FLEX Catalog](#) to view course categories and topics, and to evaluate the content of each course.
 - Acquire license for course delivery [via Firm LMS](#) and access files to upload.
 - Acquire license for course delivery [via the FLEX platform](#).
 - [Upload user information](#) using the template provided.

- [Upload course assignments](#) using the template provided.

Once users have been uploaded, they will have access to the platform via [Financial Professional Gateway \(FinPro Gateway™\)](#). Course assignments will be viewable once the user accesses the platform via the Firm Assigned CE (FLEX) link in [FinPro Gateway](#).



The screenshot shows the FINRA FLEX dashboard. On the left is a vertical sidebar with icons for Home, User, and Help. The main area is titled 'My Dashboard' and contains a 'My Tasks' section. A task is listed: 'A disclosure letter was received by ABC FINANCIAL SERVICES INC. on 11/26/2025.' with a 'View Details' link and a 'VIEW FIRM CONTACTS' button. Below this is a box for 'Firm Assigned CE (FLEX) Required ①' with a 'View Program Details' link and a 'GO TO MY PLAN' button. To the right is a 'Shortcuts' section with links to 'Print U4', 'View US', and 'Go to FINRA.org'. Below that is a 'Continuing Education Program Status' section showing 'Reg Element CE Satisfied ①', 'Firm Assigned CE (FLEX) Required ①', and 'IAR CE Satisfied ①'.

Please let us know if you encounter any issues with accessing the FLEX link on FINRA Gateway. You can email us at flex@finra.org for assistance with any issues.