

# Transforming Wealth Management

**You rely on your advisor in many ways—to offer guidance on financial issues, to deliver investment intelligence and portfolio strategies, and to have a clear perspective on how best to achieve your life goals. You trust your advisor for more than just financial advice; also to know you, your family and your aspirations for the future.**

**At Investnet, it's our mission to help your advisor with the crucial tasks of building and preserving your assets, while establishing and maintaining a strong relationship with you, so you can be assured that your needs are being met as they evolve over time.**

## Who is Investnet?

Investnet® is a powerful partner to your financial advisor. We provide integrated wealth advisory software, advanced portfolio solutions, practice management and portfolio-monitoring and reporting services. Our AdvisorSuite™ platform gives your advisor the tools to more effectively meet your unique investment needs.

Since our beginnings in 1999, Investnet has grown into one of the largest providers of wealth management solutions to independent financial advisors today. We believe our success stems from addressing a very real need for a software “desktop” that integrates the complex set of services and capabilities required to run a wealth management practice.

Our leadership team understands the responsibilities and business needs of your advisor from decades of personal experience in the industry. This gives us unusual clarity and vision in defining and delivering products, technology and services necessary to meet the growing expectations of investors.

By bringing together investment and practice management expertise, leading-edge technology and strong management teams, we have become an unmatched wealth management partner to your advisor.



# How We Partner With Your Advisor

At Envestnet, our offerings span the four key phases of the advisory process—Advise, Invest, Manage and Report. We have divisions dedicated to each of these core quadrants to deliver the utmost in wealth management.



## Advise

Tools to assist your advisor in gathering information on your goals and resources. Your advisor can apply our integrated analytics and manager and fund research to help make the most appropriate recommendations.

## Invest

Unbiased access to nearly 7,000 financial products, including hundreds of asset managers and strategists—many of who are pioneers in the industry.

## Manage

Administrative tools to help your advisor effectively manage your portfolio with automatic monitoring, efficient rebalancing tools and archivable action plans and communications.

## Report

Comprehensive, easy-to-read reports with access to accurate, up-to-date account data—every business day. You can also access an Investor Console to get an update on your investments at any time.

## Our Offices

Envestnet is a public company headquartered in Chicago with offices in Boston, Charlotte, Denver, New York, Raleigh, Seattle, Sunnyvale, and Trivandrum. We employ more than 650 professionals and partner with nearly 20,000 financial advisors on more than 950,000 investor accounts.\*

For more information on Envestnet, please visit [envestnet.com](http://envestnet.com).

The information, analysis, and opinions expressed herein are for general and educational purposes only. Nothing contained in this commentary is intended to constitute legal, tax, accounting, securities, or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type. All investments carry a certain risk, and there is no assurance that an investment will provide positive performance over any period of time. The asset classes and/or investment strategies described may not be suitable for all investors and investors should consult with an investment advisor to determine the appropriate investment vehicle. Investment decisions should always be made based on the investor's specific financial needs and objectives, goals, time horizon and risk tolerance. The statements herein are based upon the opinions of Envestnet and third party sources. Information obtained from third party resources are believed to be reliable but not guaranteed. All opinions and views constitute our judgments as of the date of writing and are subject to change at any time without notice. Past performance is not a guarantee of future results.

\*as of 3.31.12

EN\_SS\_ABOUTUSINV\_0612