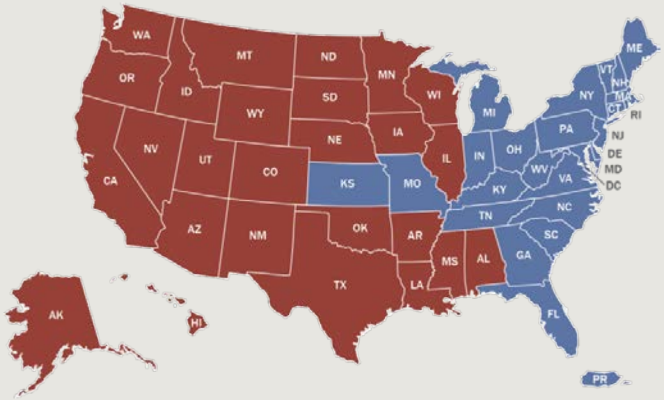
RIA Sales & Support

WEST

Business Development Director
Bryan Watson, VP
303-824-8151
bryan.watson@envestnet.com



EAST

Business Development Director
Jordan Schneider, CIMA®, AVP
484-328-5518
jordan.schneider@envestnet.com

Business Development Director

Acts as your lead relationship manager, coordinating resources to provide you with a thorough introduction and orientation to the platform. The Business Development Director is available to travel to meet with you, help you to identify client opportunities, provide assistance at the point of sale, and offer aid with marketing opportunities and practice management.

Areas of expertise include:

- *Maintaining and scaling a fee-based practice*
- *New firm engagements and consultation*
- *Practice management engagement*
- *Leveraging robust platform tools including research, overlay services, and reporting*
- *Program insight for Advisor as Portfolio Manager (APM), Unified Managed Account (UMA), and digital*

Platform Consulting Group

855-393-8028, option 1 for Advisor Directed or UMA Program, option 2 for Proposal Generation Questions and Platform Support

Delivers additional consultation and support to advisors including educating them on platform capabilities, answering inquiries regarding functionality, site navigation, and proposal creation.

Areas of expertise include:

- *Advisor directed and UMA model support including model creation, model management and trading*
- *Online proposal generation and Statement of Investment Selection (SIS) support*

Advisor Services Team

855-393-8028, option 3; Email: ASTBlue@envestnet.com

Helps facilitate the administration and management of client accounts. Once your accounts are on the Envestnet platform, the team will serve as your primary in-house resource for all day-to-day account maintenance needs.

Areas of expertise include:

- *Account administration including account funding and investing and paperwork*
- *Service requests including changing the SIS, withdrawal requests and more*
- *Billing support including client account billing advisor fees*
- *Online performance reports*