

EnterprisePortal

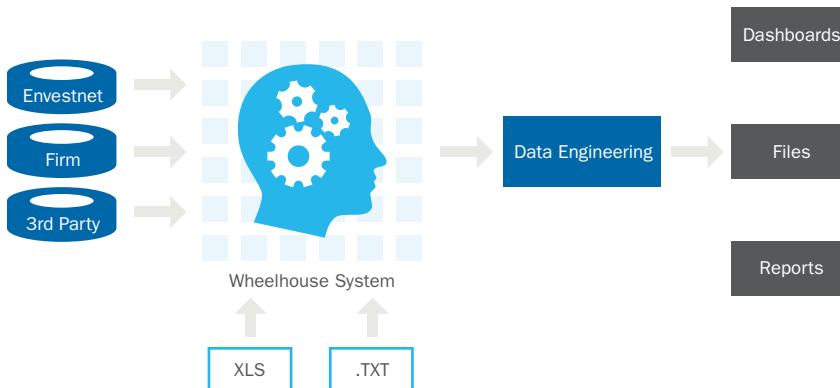
Custom Dashboards

We realize you have additional data that fills in the complete picture of your business. You may also have custom territories, specialized reporting needs, and unique ideas for our analytics.

Our analytics system is OPEN!

We can take additional data in any format to give you the most complete set of analytics available. Marrying this data with the data from Envestnet will create a custom set of analytics to help you make great business decisions.

Let us do the heavy lifting; you drive success!



Examples of Additional Data:

- Non-Envestnet AUM and Transaction Data
- Firm Hierarchy, including Teams and Split Rep Codes
- Custom Product Names
- Revenue/Expense Data

Key Users:

- Senior Executives
- Finance
- Compliance
- Sales
- Manager Relations

Further Information

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