

Top 10 Reasons

Why Managers Are Using the Envestnet Manager Portal

Leveraging Envestnet Intelligence capabilities, the Envestnet Manager Portal is designed specifically for asset managers to help identify sales opportunities and raise assets more quickly. The unique data generated from the Envestnet ecosystem allows you to gain deeper insight about your book of business, identify trends, and make better decisions on distribution strategies.

Here are the top 10 reasons why your peers are choosing the Envestnet Manager Portal:

- 1 AUM transparency**
Understand your AUM composition across the entire Envestnet platform.
- 2 Product availability**
Get visibility into which firms have access to your managed account products.
- 3 Comparison to a large universe**
Compare your AUM vs. total AUM at each Envestnet firm and analyze your market share.
- 4 Product usage by advisors**
Determine your product usage by advisors with complete data by program type and detailed UMA sleeve reports.
- 5 Product usage by third party managers**
If you are a mutual fund or exchange traded fund manager, you can identify professional money managers that use your products within their own models. It's an opportunity to leverage distribution via third party managers.
- 6 Appealing and intuitive user interface**
Slice and dice data, reorder nesting to dig deeper into the data, and obtain beautiful graphs and charts with a click of the mouse.
- 7 A big picture**
Look across Envestnet's footprint to identify trends in overall money movement and product utilization.
- 8 Lead generation**
Access an extensive and ever expanding firm-level contact database at your fingertips.
- 9 Competitive intelligence**
Gain the needed insight to identify and analyze the competitive landscape by product type, by investment style, by assets/flows level and even by performance across the entire Envestnet platform.
- 10 Ultra-competitive fee**
Pay \$20K per year for the Base Subscription package. No maintenance fees on your distributed products **guaranteed!**

For more information about the Envestnet Manager Portal, contact us at envestnetmanagerportal@envestnet.com for a demonstration or to register today. An Advanced Analytics package is also available in addition to the base subscription.