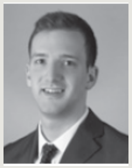
ENVESTNET®
Empower your practice

RIA Sales & Support



Jon Perkins

AVP, Business Development Director
(312) 827 - 3974
Jonathan.perkins@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. Jon 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*

Mark Marcellino

Business Development Consultant
(857) 702 - 0013
Mark.marcellino@envestnet.com

Business Development Consultant

Primary contact to help you navigate the investment choices available, and helping you make the right product fit for your clients or prospects. The Regional Consultant can also assist with platform configuration, report customization, and large case design. They work on behalf of clients to navigate inside of the Envestnet organization to coordinate such items as; billing updates, configuration changes, report customization, etc.

Areas of expertise include:

- *Sales, Marketing and Service coordination*
- *Proposal design including asset allocation and manager selection*
- *Platform configuration and customization*
- *Positioning investment solutions with end-clients and prospects*
- *Firm level support and coordination on behalf of clients*
- *Scheduling platform training and ongoing firm support*
- *Escalated service and support requests*

Advisor Services and Platform Consulting Group
(855) 393 – 8028
ASTBlue@envestnet.com

Advisor Services and Platform Consulting Group

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. In addition, the team 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:

Web Navigation

- *Proposal*
- *Reporting*
- *Investor Portal*
- *Model Management (APM/UMA)*
- *Research Filtering*

Account Level Service

- *New Registration*
- *Cash Request*
- *Investment modification*
- *Trading Inquiry*
- *Billing Configuration*

General Inquiry

- *Billing Administration*
- *Report Generation*
- *New User Setup*
- *Custodial Inquiries*