

Envestnet Cares

2019 Charitable Giving Report



GIVING

We are pleased to share this annual report of Envestnet's charitable giving and community engagements in 2019.

Envestnet's primary areas of focus in 2019 were supporting education and assisting families in need in the communities where we operate around the world. We achieved these goals through long-term partnerships as part of our Signature Impact initiatives, annual giving to over 34 charitable organizations, and by amplifying and empowering the generosity of employees through a charitable matching program and by supporting their direct volunteer engagements.

We are fortunate in so many ways. Every day we have opportunities to serve financial advisors and support their goal to deliver financial wellness and improved outcomes to millions of investors. And from this work, we maintain a commitment to reinvest some of the fruits of our work to assist those in need regardless of their place, ethnicity, faith tradition or gender.



2019 GIVING

\$850K

AROUND THE WORLD

Envestnet donated \$850K in 2019 to 40 charitable organizations in the communities where we operate.

LONG-TERM COMMITMENTS

\$1.5M

Envestnet has entered into long-term commitments with six organizations for a total financial commitment of \$1.5M, including two initiatives in India, through the Signature Impact program.



Envestnet matched **\$135K** in employee charitable gifts to **262** organizations

4,712 Hours volunteering through **66** events in **7** Cities

In 2019 Envestnet Cares nearly **tripled volunteer efforts**, to total over 600 employees volunteering over 6,000 hours across the US since the inception of the program, equivalent to 589 days of service.



Envestnet Cares Initiatives

Envestnet has organized its charitable initiatives in four primary ways:

Signature Impact

Signature Impact initiatives are focused on fostering long-term partnerships with charitable organizations in the communities where we operate. Long-term commitments provide a more predictable source of funding to our charitable partners and provide a way for Envestnet to create a meaningful and lasting impact on targeted efforts to support education and families in need.

Annual Corporate Giving

Envestnet supports a wide range of charitable organizations with a primary focus on issues of education and children and families in need. Annual gifts are identified by Envestnet employees and are facilitated through the Envestnet Cares Committee. Envestnet’s annual giving is meant to be flexible in responding to more immediate needs in our communities, including disaster relief efforts.

Volunteering

Direct engagement and service to others is central to Envestnet’s charitable giving strategy. Envestnet supports employee volunteering—whether independent or through organized volunteer events within each office—by providing paid time off and funding for employee volunteer events.

Multiplying Employee Giving

Envestnet multiplies the charitable generosity of employees through charitable matching for each personal gift by an employee to a registered charity, up to \$2,500 per year.



Signature Impact



CFP Board for Financial Planning – Envestnet entered into a five-year commitment to fund scholarships to promote diversity within the financial planning community and to invest in the next generation of financial advisors.



Chicago Ideas – Envestnet made a multi-year commitment to support a broad spectrum of thinkers and instigators who share ideas to transform our world in powerful and impactful ways.



The Foundation for Financial Planning – The Foundation for Financial Planning provides pro bono financial planning and advice to at-risk groups in times of need including cancer survivors, wounded veterans, domestic violence survivors, and others.



Envestnet Institute in Classrooms – In partnership with EVERFI & The Network for Teaching Entrepreneurship, the Envestnet Money Smart program is two educational online classes and course-completion certifications for kids in the 3rd through 12th grades. That's 20 schools in 4 low income cities reaching over 500 students in the 2019-2020 academic school year.



Opportunity International – Envestnet made a four-year commitment to support micro-finance for women entrepreneurs and to provide educational scholarships for students in and around Trivandrum, India.



Water.org – Envestnet made a three-year commitment to support the work of Water.org in Bangalore, India, to help break cycles of poverty by providing clean water and sanitation as a foundation for community development.

Annual Giving

Envestnet provided annual support to the following organizations in 2019.



Black Fem

BlackFem

BlackFem creates curriculum and training for teachers to educate young black girls in personal finance and financial literacy in an effort to break cycles of poverty.



By the Hands Club for Kids

By The Hand Club for Kids is a Chicago-based organization that serves children who live in high-risk, inner-city neighborhoods by providing academic tutoring, after school programs, and other essential services.



Children's Alopecia Project

Builds self-esteem in children living with alopecia by providing support for them and their families and by raising awareness about the life-altering disease.



Code the Dream

Code the Dream offers free intensive training in software development to people from diverse low-income backgrounds, to launch careers with enormous opportunity for themselves, their families, and their communities.



Coded By Kids

Coded By Kids' prepares underrepresented young people to succeed as tech and innovation leaders through project-based learning and mentorship. Our vision is to create equity in the world through technology and innovation.



Cradles to Crayons

Cradles to Crayons is an innovative non-profit that provides children from birth through age 12, living in homeless or low-income situations, with the essential items they need to thrive - at home, at school and at play.



Crime Victims' Center of Chester County

The Crime Victims' Center of Chester County provides comprehensive resources to victims of crime, including advocacy, education and legal support.

Annual Giving

Envestnet provided annual support to the following organizations in 2019.



Denver Active 20/30 Children's Foundation

The mission of Denver Active 20/30 Children's Foundation is to develop philanthropic leaders who mobilize the community to impact the lives of disadvantaged children through annual fundraising events and projects.



Family Action Network

The Family Action Network is a not-for-profit organization that empowers communities and families with access to educators and other professionals through programming that educates, inspires and positively impacts Chicago-area communities.



Financial Services Coalition of Puget Sound

The Financial Services Coalition of Puget Sound provides professional development programs, supports educational advancement, and promotes economic empowerment for its members and the minority communities at large.



Golfers Against Cancer

Golfers Against Cancer raises money to fund cancer research. The Denver Chapter has raised more than \$1,000,000 for research projects at the University of Colorado Cancer Center.



Greater Boston Food Depository

The Greater Boston Food Bank is the largest hunger relief organization in New England.



Her Spark, Inc.

Her Spark's mission is to equip girls with the STEM skills and opportunities to succeed in the careers of tomorrow - dedicated to solving gender disparity in computer science, engineering and technology careers.



Interprofessional Community Clinic

ICC is a student run, free health clinic in Lake County, Illinois, that serves families and children in need of medical care.



Invest in Others

Invest in Others promotes the charitable impact that individuals and firms in the financial industry make on their communities. Through programs and events, Invest in Others helps advisors make the most of their charitable work and have an even bigger impact.

Annual Giving

Envestnet provided annual support to the following organizations in 2019.



JDRF

JDRF is leading the fight against type 1 diabetes by funding research, advocating for policies that accelerate access to new therapies, and providing a support network for millions of people around the world impacted by type 1 diabetes.



Jewish United Fund

Jewish United Fund

The Jewish United Fund helps to transform the lives of over 500,000 Chicagoans of all faiths who are in need at every stage of life. Services are provided for those who are economically disadvantaged or in crisis, seeking employment, people with disabilities, at risk children, seniors, and others with special needs.



Josephinum Academy

Josephinum Academy is a college preparatory school for girls located in the inner-city of Chicago. Envestnet's support provides scholarship assistance for students with financial need.



Junior Achievement - Seattle

Junior Achievement is the nation's largest organization dedicated to giving young people the knowledge and skills they need to own their economic success, plan for their futures, and make smart academic and economic choices.



Juvenile Protection Agency - Chicago

JPA's mission is to improve the social and emotional well-being and functioning of vulnerable children so they can reach their fullest potential at home, in school, and in their communities.



Lankenau Institute for Medical Research (LIMR)

Lankenau Institute for Medical Research seeks remedies for cancer as well and other diseases. Our research is at the leading edge of today's immunotherapy revolution in health care.



Lyric Opera of Chicago – Lyric Unlimited Education Initiative

The Chicago Lyric Opera - Lyric Unlimited serves elementary through high school students and teachers through school residency programs, teacher workshops, backstage tours, and special performances.



Night Ministry

The Night Ministry is a Chicago-based organization that works to provide housing, health care and human connection to members of our community struggling with poverty or homelessness.

Annual Giving

Envestnet provided annual support to the following organizations in 2019.



North Chicago Community Partners

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North Chicago Community Partners strengthens communities through investments in school and family-focused programs.



PAWS

Chicago-based non-profit and national model in animal sheltering, committed to ending the threat of killing homeless cats and dogs. Also provides outreach programs to benefit people with pets in low-income and under-served Chicago neighborhoods.



Pennsylvania Ballet Community Outreach

The Pennsylvania Ballet Community Outreach organizes programs to introduce ballet in public schools.



Pets of the Homeless

The only national organization focused exclusively on feeding and providing veterinary care to pets of our homeless community.



Philabundance

Philabundance seeks to drive hunger from our communities today and end hunger forever.



The Free Library of Philadelphia

Provides new and gently used books to children and families, teachers, schools, and other nonprofit partners and offers literacy and support programs for children and families.



Project Home

Project HOME is a Philadelphia non-profit organization empowering individuals to break the cycle of poverty and homelessness through affordable housing, employment, health care, and education.



Ronald McDonald House

Ronald McDonald House provides a place for families to call home so they can stay close by their hospitalized child.



Safe Harbor West Chester

Safe Harbor's goal is to help rebuild lives and life skills, reestablish self-esteem, and help people overcome the issues that prevent them from leading independent, productive lives.

Annual Giving

Envestnet provided annual support to the following organizations in 2019.



Saving Promise

Saving Promise's mission is to disrupt the cycles of domestic violence which affect 1 of 3 people in the United States. Saving Promise works with the Harvard Learning Lab to provide education and awareness to at-risk children throughout the United States.



SCOPE

SCOPE's mission is to promote education by sending underprivileged children to camp.



Tech Girlz

The TechGirlz mission is to inspire middle school girls to explore the possibilities of technology to empower their future careers.



West Valley Community Services

West Valley Community Services fights hunger and homelessness in the West Valley communities of Northern California.



Envestnet Cares – Berwyn



Food Bank – Denver



Food Lifeline – Seattle



TrashMob Earth Day – Chicago, Berwyn, Denver, Raleigh, and Seattle

2019 Volunteer Events

PAWS Chicago where volunteers cleaned the facility and spent time bonding with the shelter animals.

The Kevin Cain Make My Day 5K where volunteers raced and raised donations for cancer research.

If The Shoe Fits, aiding 200 children in high-needs communities across the country receive new shoes.

Trash Mob! 67 Employees in Chicago, Berwyn, Denver, Raleigh, and Seattle united to collect garbage across our respective cities in celebration of Earth Day.

Envestnet Cares continues our partnership with **By the Hand**, a Chicago-based after-school program, by facilitating a course titled, "Financial Literacy + You." Students and parents from the Westside of Chicago participated in an original curriculum developed and presented by Danny Hamer, VP of Solutions & Engagement Management.

Cradle to Crayons: Boston-based volunteers spent the day at The Giving Factory Warehouse processing donated goods for distribution to children in need.

Shoes that Fit allowed volunteers to outfit underserved youth in the Pennsylvania area with over 100 pairs of shoes.

Seattle Children's Hospital: this annual event was a success again this year, with twenty volunteers donating their time and energy on a Sunday to clean and groom the grounds around the hospital.

Urban Peak: volunteers served breakfast at this Denver non-profit organization which provides services for youth ages 15 through 24 experiencing homelessness or at imminent risk of becoming homeless.

Raleigh and Chicago both participated in events with **Ronald McDonald House Charities** in their respective cities. Volunteers cooked a meal and spent time with the families who are currently living in the RMHC home as their children undergo lifesaving medical treatments.

Back by popular demand, Boston volunteers spent the day with **Cradle to Crayons** processing donated goods to children in need at The Giving Factory Warehouse.



Habitat for Humanity – Raleigh



Mapathon – Seattle



TrashMob Earth Day – Chicago, Berwyn, Denver, Raleigh, and Seattle



The Night Ministry and Pets of the Homeless – Chicago

2019 Volunteer Events

Denver organized a **Fill a Backpack** event where a volunteer crew purchased and filled 240 backpacks with school supplies for K-12 graders for their first days of school.

Denver also is leading the ENV Cares sustainability efforts, facilitating an **Urban Trail Cleanup** collecting garbage in the Mile High city on a day of record-breaking heat.

Berwyn employees worked with **Surrey Services for Seniors** on a landscaping project.

Chicago hosted a 2nd Annual event with **The Night Ministry**, this year adding a new charity, Pets of the Homeless, where employees spent an extended lunch hour packing meals and supplies for homeless humans and their furry family members.

ENV Cares continues our partnership with **American Red Cross** as ENV cities across the country united for a simultaneous event where volunteers mapped rural places of Myanmar to help assist medical professionals to bring aid to uncharted territories. ENV Cares Seattle led the **Mapathon** with a whopping 26 volunteers! The Mapathon allowed 70 ENV employees to volunteer and connect at one time for one volunteer event

ENV Cares Committees across the nation hosted clothing and gift drives for children and families in need. Additionally Seattle hosted a **T2P2 Hygiene Drive** for personal products for the homeless.

Raleigh had an all-women's build event for **Habitat for Humanity** to benefit single mothers.

Seattle continues our partnership with another event with the **Seattle Children's Hospital** performing grounds care.

ENV Cares Seattle, Berwyn, and Chicago all continue to focus on the welfare of school-children with our work with the **Lake Washington School District** creating Pantry Packs event, in Pennsylvania through a partnership with the **Delaware Valley Children's Charity** and in Chicago with an end-of-year event with Youth Guidance.

ENV Cares Berwyn worked with the **Minor Threats Chess Club** to tutor and encourage relationships with children in at-risk communities.



Children's Hospital – Seattle



Paws Event – Chicago



Minor Threats Chess Club – Philadelphia



Fill A Backpack – Denver

2019 Volunteer Events

Volunteers returned to **PAWS Chicago** where the team spent a pre-Thanksgiving event cleaning the facility and spent time bonding with the shelter animals

ENV Cares continues to grow our partnership with **Cradle to Crayons** as Berwyn and Boston-based volunteers spent time at The Giving Factory Warehouse processing donated goods for distribution to children in need. Additionally Boston participated in a **Back-Pack-A-Thon** to benefit school-children.

Raleigh, Boston, and Chicago furthered our partnership this year with **Ronald McDonald House Charities** as volunteers cooked meals and spent time with the families who are currently living in the RMHC home as their children undergo lifesaving medical treatments.

The Denver ENV Cares Committee created Emergency Moving Kits for **Colorado Coalition for the Homeless**.

Additionally, there were many efforts to feed the homeless across all cities: in Berwyn volunteers aided the **Chester County Food Bank**, in Denver volunteers worked an event with **The Food Bank of the Rockies**, in Seattle at **Food Lifeline**, and in Chicago volunteers spent the day with the **Greater Chicago Food Depository**.

Envestnet Cares volunteers united for another National event as participants devoted time and energy-efforts towards the **Arthritis Foundation Jingle Bell Run**.

Many thanks and appreciation for the Envestnet Cares Committees of 2019:

National Coordinator – Jessica Word

Chicago – Lauren Hensley

Berwyn – Christine Henzy and Laura Hurley

Denver – Liz Gertz

Raleigh – DeAndrea Wilson

Seattle – Jen Paden and Tess Malone

Boston – Emmanuella Umberto

Redwood City – Anna Maich



Greater Food Depository – Chicago

2019 Volunteer Events – India

Provided Ambulance for **Palliative Care Unit** – Kummil Village Panchayat is located in Chadayamangalam Taluk of Kollam district, bordering the Trivandrum district. This Village has a total population of 20,383 and there are about 5,500 houses. Kummil palliative care unit currently helps 118 patients (69 female and 49 male.)

School (Radio) Broadcasting System for Government School – Shri Pattom Thanu Pillai Memorial Model Government Upper Primary School was one of four schools listed to close down in the Trivandrum district for deficiency of students. In 2018 Envestnet India CSR supported transforming the school into a smart school. Now the school is among one of the best primary schools with smart classroom facilities in its district. Thiruvananthapuram and the student population have gone up from less than 40 to 120.

Empowering Girls – Envestnet Sponsors 20 female students hailing from financially disadvantaged families of Trivandrum.

Support for Dialysis patients – Envestnet CSR is continuing its support of fifteen financially disadvantaged patients with kidney failure or damaged kidneys, offering essential medicines for those who are undergoing dialysis.

Financial Support to **Rotary Institute for Children** in Need of Special Care – Rotary institute provides training for about 120 differently abled students from disadvantaged sections of society in Trivandrum City. The Institute also extends boarding facilities to over fifty students at no cost.

Renewal of Anganawadi units (rural child care centre) – Forty of Anganawadi's units were selected for renovation in association with Sri Sathya Sai Trust- Kerala. These units were heavily affected by the floods.



Palliative Care Unit



School (Radio) Broadcasting System for Government School



Rotary Institute for Children



Renewal of Anganawadi units

