

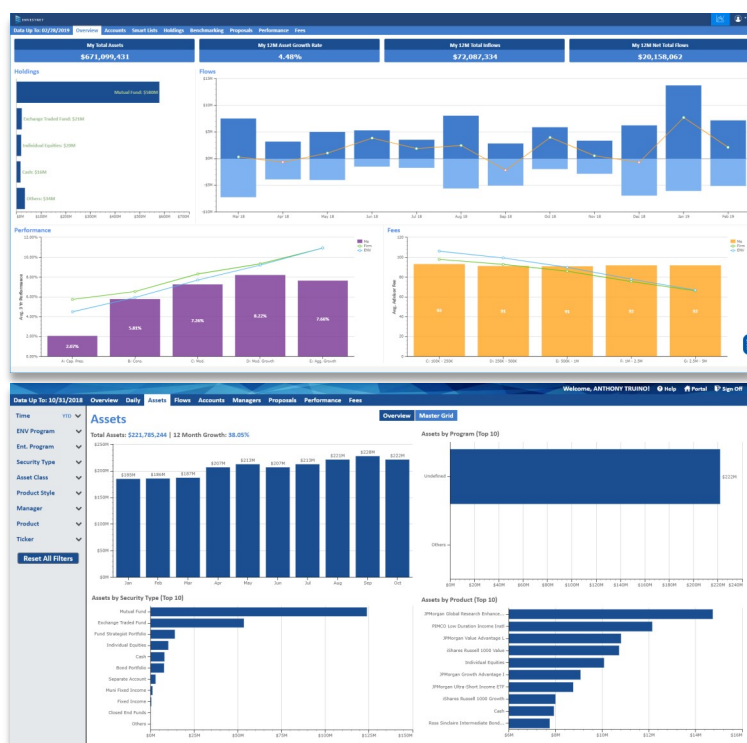


Enterprise Advisor Analytics

# Advisor Analytics Dashboards

Envestnet Analytics has been a critical tool for some of the most successful Enterprises, and we are now bringing unparalleled insights for your advisors to help drive growth, achieve scale, seize opportunities, and conquer challenges.

Using our team of data engineers, scientists, and analysts, we work with the vast amount of data in the Envestnet platform to provide our partners with robust analytics. We do all the heavy lifting to turn production data into an analytical database which you can then access through our cutting edge dashboard system and answer-based user interface, available anywhere on any device. Our goal is to help you manage and grow your business, produce better client outcomes, work more efficiently, and stay in compliance.



Running an advisory business is complicated. Envestnet Advisor Analytics dashboards, focused on the key drivers of their business, will provide your advisors with the answers they need to be more successful.

**For further information, contact:**

The Envestnet Analytics team at 215.240.7063.

## What Can Your Advisors Do?

### Manage and Grow Business

- Keep informed of key advisor trends
- Benchmark key business drivers vs. peers

### Provide Better Client Outcomes

- Benchmark performance
- Improve after-tax outcomes

### Work More Efficiently

- React to actionable insights from notifications and alerts
- Monitor client goals and achievement in one place

### Stay in Compliance

- Monitor investment policy exceptions
- Compare and set optimal fees

## Ways to Access

- Interactive Dashboards and Reports
- Question and Answer-Based Dashboards
- Envestnet Intelligence Mobile App
- Envestnet Intelligence Alexa Skill



## Enterprise Advisor Analytics

# Further Information

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