

Envestnet Cares

2022 Charitable Giving Report



GIVING

We are pleased to share this annual report of Envestnet's charitable giving in 2022.

Envestnet is transforming the way financial advice and wellness are delivered. Our mission is to empower advisors and financial service providers with innovative technology, investment solutions, and data-driven intelligence to make financial wellness a reality for everyone. Envestnet is also committed to compassionate action. Our charitable focus embraces education, financial literacy, and helping those in need in the communities where we work and live. We achieve these goals by engaging in multi-year partnerships through Signature Impact initiatives, annual giving to organizations highlighted by employees, volunteering in our neighborhoods, and by multiplying the generosity of employees through a donation matching program.

2022 GIVING



\$1.25M
AROUND THE WORLD

Envestnet donated \$1.25M in 2022 to 562 organizations in the communities where we operate.

Increased by \$250k from 2021

LONG-TERM COMMITMENTS

\$1.8M

As part of our long-term commitment to eight organizations, Envestnet's Signature Impact program has pledged \$1.8M, including two initiatives in India.



DONATE



Envestnet matched \$374K in employee charitable gifts to 490 organizations

A 10% increase over 2021

Investnet Charitable Giving Initiatives

Investnet organizes its charitable initiatives in four ways:

Signature Impact

Signature Impact initiatives are focused on fostering long-term partnerships with charitable organizations in the communities where we do business. Long-term commitments provide a more predictable source of funding for our charitable partners. By focusing our charitable giving we can have a more meaningful and lasting impact on charities that support education, financial literacy, and people in need.

Annual Corporate Giving

Investnet supports a wide range of charitable organizations with a continued primary focus on issues of education, financial literacy, and people or communities in need. Annual gifts are identified by Investnet employees and facilitated through the Investnet Charitable Giving Committee. Investnet's annual giving is flexible in responding to the most immediate needs in our communities.

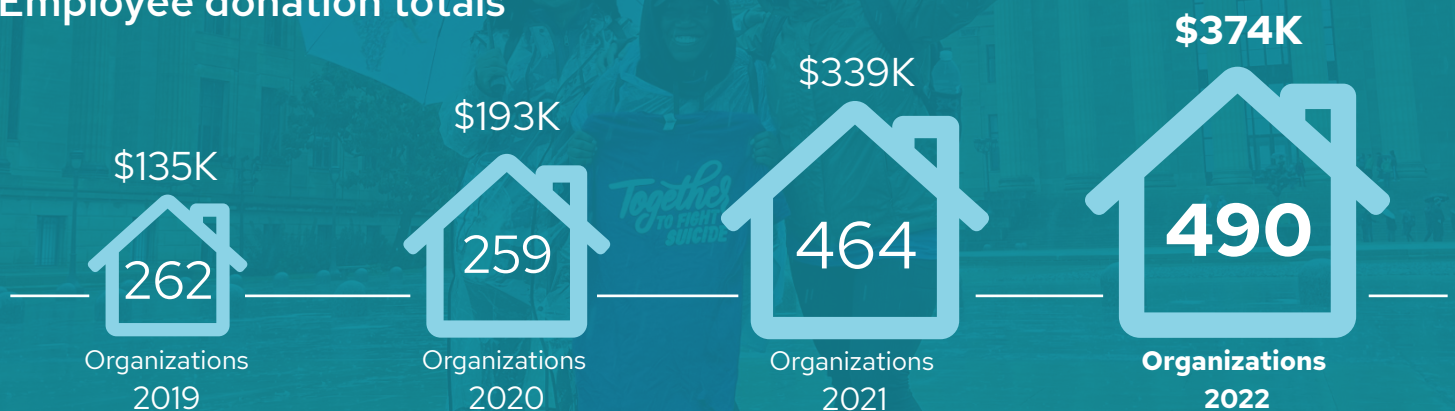
Volunteering

Direct engagement and service to others are vital to Investnet's charitable giving strategy. After a long hiatus, in-person volunteering resumed in the spring of 2022 and employees volunteered across the US. In the Fall, Investnet sponsored Out of the Darkness Walks in Chicago and Philadelphia for the American Foundation for Suicide Prevention; ENV Cares teams in these cities gathered to support this important cause. In addition, Investnet continued to offer virtual volunteer events allowing employees to make an impact from their home or office locations. Investnet employees built skateboards, wrote notes to elderly adults, and made dog toys for rescue shelters.

Multiplying Employee Giving

Investnet multiplies the charitable generosity of employees through donation matching. For each personal gift by an employee to a registered 501(c)(3) organization, Investnet matches the gift up to \$3,000 per year. We offered four double-match campaigns in 2022 to support several vital causes, including Ukraine Relief, Pride and Equality, Suicide Awareness, Food Insecurity, and Homelessness. We are proud of the generosity of our employees and their desire to give back to their communities.

Employee donation totals



A man with a beard and short hair, wearing a light blue button-down shirt and dark jeans, is smiling at the camera. He is standing in a workshop or studio, leaning over a table. On the table, he is working on a skateboard deck with a compass and a ruler. The background shows other people working at tables, and large windows letting in natural light. The entire image has a blue tint.

Signature Impact Profiles

CFP BOARD

Charity Name	The Center for Financial Planning, Washington, DC
Charity Navigator Rating:	★★★★
Mission:	The Center for Financial Planning is a distinct initiative of the CFP Board, focused on creating a more diverse and sustainable financial planning profession, so that every American has access to competent, ethical financial planning advice.
Charity Highlights:	<ul style="list-style-type: none"> To date, 75 Envestnet scholarships have been awarded, totaling approximately \$414K, with a focus on women and people of color. 14 Envestnet scholars have become CFP® professionals, with an additional 17 in the final stages, and an additional 41 recipients are working to complete the education coursework. The number of women CFP professionals grew to 21,504, representing a 4.2% increase over the prior year.
Envestnet Partner Since:	2018
Commitment Through:	2025
2022 Contribution:	\$100,000
Area of Focus:	Educational



Learn More about CFP Board Foundation:

The Center is advancing the financial planning profession through three strategic pillars:

- **Talent Pipeline** - Cultivating a quality workforce to ensure the profession can recruit and retain the talent it needs to grow.
- **Diversity & Inclusion** - Fostering a more diverse financial planner workforce that reflects the changing demographics in the United States.
- **Knowledge for Practice** - Building the body of knowledge and elevating financial planning as a recognized academic discipline in colleges and universities.



"I decided to become a financial planner because I believe that it is an honor to be the guide that helps people navigate through financial decisions and the architect that helps individuals build the future they want for themselves and their families. Receiving The Envestnet Scholarship will help me be my best in that work by furthering my education and supporting my pursuit of CFP® certification."

Corrigan Garcia

*Undergraduate Student, Texas A&M University
2022 Envestnet Scholarship Recipient*

Charity Name	NFTE / EVERFI, Washington, D.C.
Charity Navigator Rating:	★ ★ ★
Mission:	Network for Teaching Entrepreneurship (NFTE) activates the entrepreneurial mindset and builds startup skills in youth from under-resourced communities to ensure their success and to create a more vibrant society. EVERFI Investnet Institute in Classrooms creates scalable learning solutions to deliver impactful digital education that will reinforce the core skills everyone needs to be successful, now and in the future. These two organizations have partnered together for over nine years, in collaboration with financial institutions across the country, to deliver digital education focused on financial literacy and entrepreneurship skills to hundreds of thousands of youth in communities large and small.
Charity Highlights:	<ul style="list-style-type: none"> • Investnet Institute in Classrooms consists of two online courses for school-age children: Vault, a program for children grades 3 through 6; and Marketplace, for children grades 9 through 12. • Last year, 870 students in 22 low-to-moderate income schools completed these courses, and in May, Investnet expanded the reach of this program to include up to 7 schools in the Raleigh area. • Post-course assessments indicate elementary school students who completed the Vault course increased their knowledge by 55% in financial decision-making, budgeting and spending, income and careers, credit and borrowing, and future planning.
Investnet Partner Since:	2019
Commitment Through:	2023
2022 Contribution:	\$100,000
Area of Focus:	Education / Financial literacy
How to Engage with Charity:	Investnet employees and their children enjoy both Vault and Marketplace courses. Additionally, Everfi helps Investnet Cares volunteers connect with teachers looking for support via Zoom and in schools to meet the students and help reinforce what they are learning.



Learn More about Investnet Institute in Classrooms:

About Financial Education

From Financial Education to Financial Capability

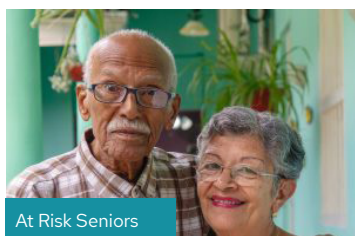
Financial education designed for sustained impact goes beyond focusing on financial knowledge and supports the development of students' confidence and healthy financial habits.

Seminal research published by the Global Financial Literacy Excellence Center Center² finds that financial education has a positive impact on both knowledge and behaviors, and effects are consistent across income levels. The research noted significant impact among children (younger than 15) and young adults (15-25).





Charity Name	Foundation for Financial Planning, Washington, DC
Charity Navigator Rating:	★★★★
Mission:	<p>Foundation for Financial Planning (FFP) is the nation's leading charity dedicated to advancing pro bono financial planning for at-risk populations, including active military members and wounded veterans, people with cancer and other serious medical diagnoses, seniors and family caregivers, low-income individuals and their families, domestic violence survivors and many more.</p> <p>Over its more than 25 years, FFP has provided \$9 million in grants to national and community-based pro bono programs; worked with partners to activate more than 24,000 financial planners to volunteer their time and talents; reached over 600,000 people in crisis or need; and acted as a leader and catalyst to foster a rich tradition of pro bono service across the financial planning profession.</p>
Charity Highlights:	<ul style="list-style-type: none"> • Awarded over \$870k to local and national pro bono programs for 2021 and 2022. • Reached over 83,746 people in need, including 75,504 through financial capability workshops and webinars and over 8,242 through one-on-one financial planning sessions. • Activated 1,627 volunteer financial planners. • Helped bring intensive pro bono financial planning to 462 families facing a serious cancer diagnosis.
Investnet Partner Since:	2019
Commitment Through:	2025
2022 Contribution:	\$35,000
Area of Focus:	Education & Social Programs
How to Engage with Charity:	ENV Employees who are CFPs can create a profile on ProBonoPlannerMatch.org to search and sign up for volunteer opportunities.



Learn More about FFP:

FFP powers pro bono financial planning for people in crisis or need by:

- Providing grants to local and national nonprofits to develop and grow pro bono programs.
- Connecting volunteer financial planners to pro bono opportunities.
- Developing innovative program models for national reach.
- Offering free financial planning resources for volunteers.
- Raising awareness of the importance and impact of pro bono service.

The organization focuses much of their grantmaking and other efforts in areas where they can have the greatest impact, including programs for active duty military and veterans, programs for people with cancer, and activating volunteers in partnership with their national strategic partner, the Financial Planning Association.



Charity Name

Project HOME, Philadelphia, PA

Charity Navigator Rating:



Mission:

The mission of the Project HOME community is to empower adults, children, and families to break the cycle of homelessness and poverty, to alleviate the underlying causes of poverty, and to enable all of us to attain our fullest potential as individuals and as members of the broader society.

Charity Highlights:

- In a year of rebuilding, Project HOME housed 1,106 people, including 72 young adults, continuing to fight homelessness in Philadelphia.
- Project Home's K-12 After school Program served 112 children, teens, and college students. 100% of the 16 seniors graduated high school, and 14 enrolled in a post-secondary program.
- The Social Enterprise program, which has several businesses and provides employment opportunities for 47 Project HOME residents.

Investnet Partner Since:

2020

Commitment Through:

2024

2022 Contribution:

\$50,000

Area of Focus:

Social Programs

How to Engage with Charity:

Internship opportunities, presentations to teens and college students, volunteering at Hub of Hope, and in-kind donation drives.



K-8 After School Program



Workforce Solutions



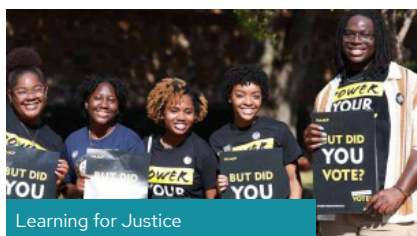
Housing

Learn More about Project HOME:

- Project HOME stands for Housing, Opportunities for Employment, Medical Care, and Education. Project HOME empowers people to break the cycle of homelessness and poverty.
- Project HOME achieves its mission through a continuum of services comprised of street outreach, a range of supportive housing, and comprehensive services. They address the root causes of homelessness through neighborhood-based affordable housing, economic development, and environmental enhancement programs, as well as through providing access to employment opportunities; adult and youth education; and health care.
- Project HOME is committed to social and political advocacy. An integral part of their work is education about the realities of homelessness and poverty and vigorous advocacy on behalf of and with homeless and low-income persons for more just and humane public policies.
- Project HOME is committed to nurturing a spirit of community among persons from all walks of life, all of whom have a role to play in making this a more just and compassionate society.

SPLC

Charity Name	The Southern Poverty Law Center, Montgomery, AL
Charity Navigator Rating:	★★★★
Mission:	The Southern Poverty Law Center is a catalyst for racial justice in the South and beyond, working in partnership with communities to dismantle white supremacy, strengthen intersectional movements, and advance the human rights of all people.
Charity Highlights:	<ul style="list-style-type: none">• In their work to protect voting rights, SPLC trained 50 organizations on combating electoral extremism and political violence in 2021.• SPLC represented 212,000+ people in class action litigation for economic justice and distributed \$118k to organizations providing food and shelter to low-income communities in the South.• SPLC tracked 1,221 hate and extremist groups across the country and their podcast, Sounds Like Hate, received an honorable mention from CNN.
Investnet Partner Since:	2020
Commitment Through:	2025
2022 Contribution:	\$50,000
Area of Focus:	Social Programs
How to Engage with Charity:	SPLC offers lunchtime updates/webinars on their current work every 6-8 weeks. All employees can attend. They are willing to speak on all-hands call or possibly at our Advisor Summit. There are volunteer opportunities for attorneys.



Learn More about The Southern Poverty Law Center:

SPLC started in 1971 to make sure the laws and policies written during the civil rights era would be upheld. This important work continues today through three initiatives:

- **Fighting Hate** - The SPLC is the premier U.S. non-profit organization monitoring the activities of domestic hate groups and other extremists. Through investigative reports, training, and expert analysis, they help inform and educate members of law enforcement, the media and the public.
- **Learning for Justice** - The SPLC provides free resources to educators—teachers, administrators, counselors, and other practitioners—who work with children from kindergarten through high school. These materials supplement their curriculum and inform their practices to create civil and inclusive school communities.
- **Seeking Justice** - The SPLC stands up for the powerless, the exploited, and other victims of discrimination and hate. For more than four decades, they have worked to bring systemic reforms in the Deep South. They have toppled remnants of Jim Crow, shattered barriers to equality for women, vulnerable children, the LGBTQ community, the disabled, and more.



Charity Name	Americares, Stamford, CT
Charity Navigator Rating:	★★★★
Mission:	Americares is a health-focused relief and development organization that saves lives and improves health for people affected by poverty or disaster. Each year, Americares reaches 85 countries on average, including the United States, with life-changing health programs, medicine, medical supplies and emergency aid. Americares is one of the world's leading nonprofit providers of donated medicine and medical supplies.
Charity Highlights:	<ul style="list-style-type: none">Over the last year Americares responded to 37 disasters in 35 countries including the U.S.They provided 2.4 million units of relief and medical supplies to people affected by humanitarian emergencies.In July, Americares was certified by the World Health Organization (WHO) as an Emergency Medical Team Type 1 – Mobile provider. The certification indicates Americares has met the highest standards for health care providers responding to emergencies and recognizes the organization's commitment to a coordinated response and safe, equitable, ethical, accountable and appropriate care.
Investnet Partner Since:	2021
Commitment Through:	2023
2022 Contribution:	\$50,000
Area of Focus:	Social Programs, Disaster Relief
How to Engage with Charity:	Americares is available to share their work with us through a webinar, All-Hands call or at the Advisor Summit. There are volunteer opportunities for employees to prepare emergency kits.



Learn More about Americares

Americares makes a difference in four areas: disaster response, access to medicine, clinical services, and community health.

- Disaster Response** - The severity and frequency of both natural and man-made disasters are on the rise. Environmental, social, and political factors contribute to the surge in complex humanitarian crises. Disasters now directly affect over 200 million people annually and Americares is ready 365 days a year so they can respond quickly.
- Access to Medicine** - To improve health outcomes for patients and communities, Americares increases access to and quality of medicine and supplies for partner hospitals, clinics and health posts as they strengthen supply chains across their network.
- Clinical Services** - Through their own clinics and partners, Americares offers treatment, prevention, and health management services to uninsured and under-served people, giving them the foundation of a productive life full of opportunity and possibility.
- Community Health** - Working through hospitals, clinics, and other health facilities, Americares works to reduce preventable illness and death and improve overall individual and family health at the community level. With a focus on empowering, informing, and educating community health workers and leaders, they help build a stronger health care system.



OPPORTUNITY
International

INDIA PARTNERSHIP

Charity Name

Opportunity International, India

Charity Navigator Rating:



Mission:

By providing financial solutions and training, Opportunity International (OI) empowers people living in poverty to transform their lives, their children's futures, and their communities. Their vision is a world in which all people have the opportunity to achieve a life free from poverty, with dignity and purpose.

Charity Highlights:

- Between June and September of 2021, Opportunity supported more than 5.3 million families with loans, an increase of about ten percent from the first half of 2021; 98.5% of clients were women, and 81% of clients lived in rural areas.
- Community health entrepreneurs conducted home health visits, providing last-mile medical care while creating jobs for women, reaching 1.5 million individuals through the program.
- Opportunity's goal is to reach an additional 1.18 million children with quality education by 2025. By early 2023 they will have launched new three-year EduQuality programs in India.

Investnet Partner Since:

2018

Commitment Through:

2024

2022 Contribution:

\$25,000

Area of Focus:

Social Programs / India

How to Engage with Charity:

OI will host a lunch and learn for ENV employees, tailored to their work in India. Investnet Cares could host a mini fundraiser. OI is willing to schedule visits for ENV employees traveling in India to meet small business owners who have benefited from micro-finance loans.



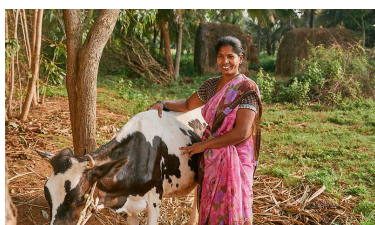
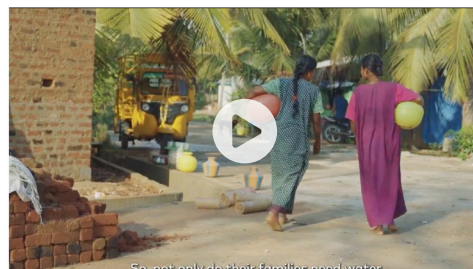
Learn More about Opportunity International:

Opportunity's initiatives in India are designed to create economic opportunities for the millions of people living in extreme poverty; improve quality of life for families, especially those in rural regions; educate children who have limited educational opportunities; and promote financial inclusion, gender parity, and income-generating opportunities for women.

In India, Opportunity focuses on initiatives including:

- Promoting gender equality and creating economic opportunities for women.
- Ensuring that families can send their children to school.
- Equipping local leaders to meet the basic health needs of their neighbors.

Charity Name	Water.org
Charity Navigator Rating:	★★★★
Mission:	Water.org is an international nonprofit organization that has positively transformed more than 51 million lives around the world with access to safe water and sanitation through affordable financing. Founded by Gary White and Matt Damon, they have been pioneering market-driven financial solutions to the global water crisis for 30 years, giving women hope, children health, and families a future.
Charity Highlights:	<ul style="list-style-type: none"> • Access to safe water can turn time spent into time saved when it's close and not hours away. For millions of women, children, and communities, access to safe water can turn problems into potential – unlocking education, economic opportunity, and improved health. • Through our partnership, which began in 2019, Investnet has supported Water.org to help transform the lives of 92,780 people. Across India, people have been provided with lasting access to safe water and improved sanitation solutions (with an estimated 3,571 people reached in 2022 alone). • Investnet support has helped mobilize \$4.2 million in capital to empower people in need to obtain household water taps, toilets, water storage, and filtration piped connections and climate-resilient solutions.
Investnet Partner Since:	2018
Commitment Through:	2024
2022 Contribution:	\$25,000
Area of Focus:	Social Programs / India
How to Engage with Charity:	Water.org offers webinars or lunch and learn meetings for ENV employees and provides information for our intranet to engage those who may want to donate or do a fundraiser.



Learn More about Water.org:

- Water.org believes water is the best investment the world can make to improve health, empower women, enable access to education, increase family income and change lives. Yet, 771 million people lack access to safe water. They're working to change this.
- Water.org is a global nonprofit organization working to bring water and sanitation to the world.

Annual Corporate Giving



Envestnet provided annual support to the following organizations in 2022.

(Visit a charity below by clicking their the logo)



Envestnet Cares – Volunteering

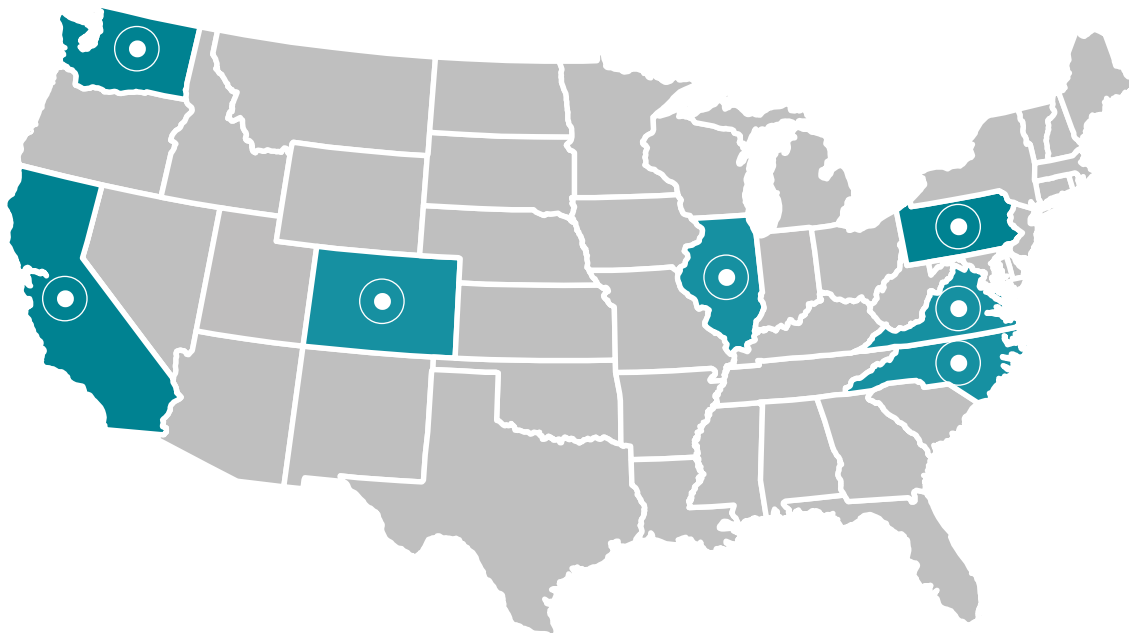


Giving back and helping others are vital to Envestnet's culture; it's evident in the generosity of its employees. Volunteering together allows us to support the vulnerable members of our communities and deepen relationships with our colleagues, too! Our Volunteer Time Off (VTO) program gives employees three days of paid VTO per calendar to make volunteering easy. Employees from across the company form committees to identify opportunities in their areas.

We currently have Envestnet Cares Committees in seven locations: Berwyn, Chicago, Denver, Powhatan, Raleigh, San Mateo, and Seattle. Each group has a co-chair who leads the committee as they plan events and encourage their colleagues to join them. After a long hiatus, Envestnet Cares resumed in-person volunteer events in the spring and had a terrific year.

In the fall, Envestnet supported the American Foundation for Suicide Prevention with a \$20k donation to sponsor Out of the Darkness Community Walks in Chicago and Philadelphia. These 5k events offer support and bring hope to communities across the country. At the same time, we launched a donation campaign with a special match for employees when they donated to organizations focused on mental health and helping people in crisis. A number of employees in each city walked, asking their family and friends to join or make a donation to support them, and others donated and took advantage of the campaign. Taking part in this coordinated effort and supporting this meaningful work was a highlight in 2022!

Envestnet also continued to offer virtual events, giving remote employees an opportunity to join colleagues across the country in service to others. We hosted three events with varied causes, so participants wrote letters to isolated seniors, made skateboards from scratch for children in need, and made dog toys for pups awaiting adoption in animal shelters.



Employee Giving



Envestnet multiplies the charitable generosity of employees through donation matching. For each personal gift by an employee to a registered 501(c)(3) organization, Envestnet matches the gift. Since its inception in 2015, the donation matching program has grown significantly currently offering a match of up to \$3,000 per employee.

Throughout the year, we also offer targeted 'Triple Your Donation' campaigns with an additional employee match to encourage employees to give generously. To that end, we held four campaigns last year starting in March, as we supported organizations providing aid in Ukraine in response to the conflict and humanitarian crisis. In June, we celebrated Pride Month and focused on organizations that support the LGBTQ+ community and other marginalized groups. In September, we turned our attention to Suicide Awareness and Prevention Month, supporting organizations that help people in crisis, their families, and their friends. Finally, in December, we invited employees to give to their favorite organizations working to end food insecurity and/or homelessness.

Through these initiatives, we raised almost \$200k to support these important causes!

Since the inception of the program, **Envestnet employees have donated \$1.4M to charities globally!**

1,842
Total Organizations

\$1.4M
Total Employee Donations

2022

- \$374K Employee Donations
- \$3,000 Matching Limit
- 490 Organizations

2021

- \$339K Employee Donations
- \$3,000 Matching Limit
- 464 Organizations

2020

- \$193K Employee Donations
- \$3,000 Matching Limit
- 259 Organizations

2019

- \$135K Employee Donations
- \$2,500 Matching Limit
- 262 Organizations

2017

- \$122K Employee Donations
- \$2,500 Matching Limit
- 218 Organizations

2018

- \$134K Employee Donations
- \$2,500 Matching Limit
- 259 Organizations

2016

- \$97K Employee Donations
- \$2,500 Matching Limit
- 152 Organizations

2016

2017

2018

2019

2020

2021

2022



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