

Basic Dashboards



For illustrative purposes only. Not based on actual client data.

Using our team of data engineers, scientists, and analysts, we work with the vast amount of data on 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, Envestnet Analytics, which is available online anywhere on any device. Our goal is to help you grow your assets, make great business decisions, and manage your partners like never before.

Envestnet Analytics provides you with the answers you need to optimize your business within the Envestnet universe of over 1300 financial advisory firms, with over \$5 trillion in assets under administration¹. Some of the leading managers are using Envestnet Analytics as their "Virtual Account Manager" and are analyzing their assets, flows, and proposals more efficiently to know which firms and products to focus on, stay ahead of their competition, and stay aware of your best advisors' trends. With Envestnet Analytics, you will get unprecedented insight into where your opportunities lie, and who you need to meet with to secure them.

¹As of 3/31/2024.

What can you do?

- Measure your success at Envestnet and Firms
- Track and respond to advisor momentum
- Find you best asset gathering opportunities
- See critical sales trends
 - Firms and advisors
 - Programs
 - Products
 - Geography
- Socialized product availability
- See your pipeline in Proposals
- Upload, store, and share your marketing content with firms on the platform


Key users

- Executives
- Heads of Distribution
- Territory / National Managers
- Product Managers
- Key Account Managers

Further information

Contact

Maeghan Duffy
Senior Business Development Associate
484.883.1602
maeghan.duffy@envestnet.com



This document is designed for Advisor/Investment Professional Use Only. The information, analysis, and opinions expressed herein are for general and educational purposes only.

Nothing contained in this document is intended to constitute legal, regulatory, tax, accounting, securities, or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type. All investments carry a certain risk, and there is no assurance that an investment will provide positive performance over any period of time. Investment decisions should always be made based on the investor's specific financial needs and objectives, goals, time horizon and risk tolerance.

The services and materials described herein are provided on an 'as is' and 'as available' basis, with all faults. The graphical illustrations herein do not represent client information or actual investments. Nothing contained herein is intended to constitute legal, tax, accounting, securities, or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type. Envestnet disclaims all warranties, express or implied, including, without limitation, warranties of merchantability or fitness for a particular purpose, title, non-infringement or compatibility.

Envestnet makes no representation or warranties that access to and use of the internet while utilizing the services as described herein will be uninterrupted or error-free, or free of viruses, unauthorized code or other harmful components. Envestnet reserves the right to add to, change, or eliminate any of the services and/or service levels listed herein without prior notice to the advisor or the advisor's home office.

This document refers to information products or services that may be in development and not yet available. Accordingly, nothing in this presentation should be construed as a representation or legal agreement by Envestnet to make available specific products or services (including, without limitation, concepts, systems or techniques.)

ADVISOR/INVESTMENT PROFESSIONAL USE ONLY AND IS NOT FOR PUBLIC DISTRIBUTION