

# Envestnet Cares

## 2024 Charitable Giving Report



# GIVING

We're excited to share Envestnet's 2024 Annual Report, highlighting the incredible impact of our charitable giving efforts over the past year.

Together with our employees, we've made a real difference—championing education, promoting financial literacy, and supporting those in need in the communities where we live and work. Through our Signature Impact commitments, community contributions, hands-on volunteer efforts, and our donation matching program, we've amplified generosity and strengthened partnerships that drive meaningful change.

Thank you to everyone at Envestnet for being part of a company that turns compassion into action!



## 2024 GIVING

**\$750K**  
AROUND THE WORLD

Envestnet donated \$750k to organizations globally.



## LONG-TERM COMMITMENTS

**\$440K**  
TO EIGHT ORGANIZATIONS

As part of our long-term commitment to eight organizations, Envestnet's Signature Impact program contributed \$440K to US and India charities.



## ENVESTNET MATCHED

**\$225K**

Envestnet matched employee donations, resulting in a contribution of over \$225K.



## VOLUNTEER HOURS

**5,120**

Employees used 5,120 Volunteer Time Off (VTO) Hours to help out with local food banks, toy and clothing drives, bike-building, furniture recycling and many more worthy causes.



# Envestnet Charitable Giving Initiatives



## Envestnet organizes its charitable initiatives in four ways

### Signature Impact

Our Signature Impact initiatives are designed to build lasting relationships with charitable organizations in the communities where we do business. By committing to long-term partnerships, we provide a consistent and reliable source of support, empowering our nonprofit partners to create meaningful change. This strategic approach allows us to drive deeper, more sustainable impact in key areas like education, financial literacy, and support for those in need.

### Multiplying Employee Giving

At Envestnet, we believe generosity has the power to create real change – so we amplify it! Through our donation matching program, every dollar our employees give to a registered 501(c)(3) organization is matched dollar for dollar, up to \$3,000 per year. In 2024, we took it even further with five special double-match campaigns, supporting Heart Health, Mental Health, human trafficking prevention, hurricane relief efforts and the Make-A-Wish foundation. These campaigns turned a \$25 donation into \$75 and gave employees the opportunity to contribute up to an additional \$1,000 for each cause. We are incredibly grateful for our employees' generosity and their unwavering commitment to making a difference in their communities!

### Annual Corporate Giving

We're committed to making a meaningful impact by supporting a diverse range of charitable organizations, with a strong focus on education, financial literacy, and helping those in need. Each year, our employees help identify key causes, and through the Envestnet Charitable Giving Committee, we direct funding where it's needed most. Our contributions are designed to be flexible and responsive, ensuring we can adapt to the most pressing challenges facing our communities. Together, we're turning generosity into action!

### Volunteering

We believe some of the most meaningful moments happen when we come together to give back. This year, our teams rolled up their sleeves and made an impact in incredible ways—building habitats for butterflies and honeybees, assembling care packages for veterans' families, packing food for those in need, and creating care packages for the LGBTQ community. We spent time with seniors, built homes, sorted clothes, and even hit the pavement to raise funds for important causes. From food banks to urban farms, trail clean-ups to school supply distribution, our employees showed up with heart and purpose. Together, we're not just working—we're making a difference!







# Signature Impact Profiles





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"> <li>• With ENV, 114 students have received awards totaling over \$609,000 for CFP certifications, exams, education and much more.</li> <li>• 2,502 new CFP® professionals under the age of 30 in 2024, bringing the total number to 6,623. This is a 104% increase since 2016.</li> <li>• 1,720 new women CFP® professionals in 2024, bringing the total number to 24,546. This is a 38% increase since 2016.</li> <li>• 947 new racially and ethnically diverse CFP® professionals in 2024, bringing the total number to 10,239. This is a 238% increase since 2016.</li> </ul>
Investnet Commitment	2018-2025
Investnet Annual Giving	\$100,000
Investnet 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 and 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 am honored and grateful to be a recipient of the Investnet Scholarship, as it will help me continue to pursue my degree in Finance with a concentration in Personal Financial Planning at Bentley University. I hope to inspire others to pursue a career in the financial services industry, especially women. With the help of this scholarship, I am one step closer to reaching my professional goals."**

**Bridget Gleason**  
Undergraduate Student, Bentley University  
2024 Investnet Scholarship Recipient

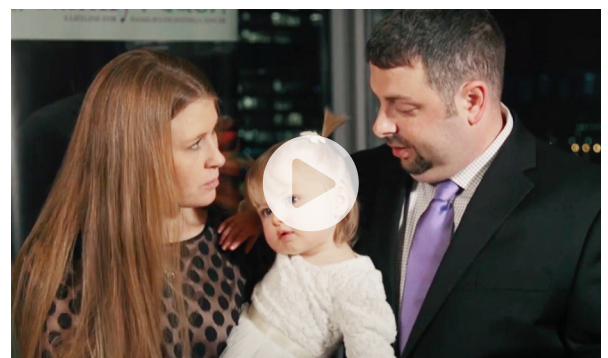
<b>Charity Name</b>	Foundation for Financial Planning, Washington, DC
<b>Charity Navigator Rating</b>	★★★★
<b>Mission</b>	<p>The Foundation for Financial Planning works to help people in need improve their financial lives by expanding access to pro bono financial planning. They envision a future in which all people can benefit from quality financial advice.</p> <p>As they develop and support programs across the country, FFP is connecting vulnerable families and individuals to free, quality financial advice. Pro Bono Financial Planning programs benefit senior citizens, homeless women and their families, low-income homebuyers, military, domestic violence survivors, and cancer survivors.</p>
<b>Charity Highlights</b>	<ul style="list-style-type: none"> <li>• Awarded over \$912,500 to local and national pro bono programs.</li> <li>• Reached over 124,000 people with pro bono advice, including 23,000 financially vulnerable seniors, through their Retirement Resilience Program and 2,000 families with the Pro Bono for Cancer program.</li> <li>• Activated 1,750 volunteer financial planners who collectively donated over 18,000 hours of service.</li> <li>• Reached over 27,800 people in need, including 23,000 people through financial capability workshops and webinars and 7,000 people through one-on-one financial planning sessions for groups like underserved women, military veterans and many more.</li> <li>• Brought intensive pro bono financial planning to over 320 families facing serious cancer diagnosis, adding to the 2,340 total families helped with the Pro Bono for Cancer program.</li> <li>• Activated 1,700 volunteer financial planners who collectively donated over 13,000 hours of service valued at \$2.6M.</li> </ul>
<b>Investnet Commitment</b>	2019-2025
<b>Investnet Annual Giving</b>	\$35,000
<b>Investnet Area of Focus</b>	Education & Social Programs

## 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.







<b>Charity Name</b>	NFTE / EVERFI, Washington, D.C.
<b>Charity Navigator Rating</b>	★ ★ ★ ★
<b>Mission</b>	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 eight 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.
<b>Charity Highlights</b>	<ul style="list-style-type: none"> <li>• Investnet Institute in Classrooms offers two free online courses for school-age children: Vault, a financial literacy program for children grades 3 through 6; and Marketplace, for children grades 9 through 12.</li> <li>• Since 2020, 5,506 students have completed over 5,000 hours of courses in financial literacy in Chicago, Philadelphia, Raleigh, Richmond and Seattle.</li> <li>• 69% of students that took the Marketplace: Investing Basics course said they are excited about investing in the stock market when they are older.</li> </ul>
<b>Investnet Commitment</b>	2019-2027
<b>Investnet Annual Giving</b>	\$100,000
<b>Investnet Area of Focus</b>	Education / Financial literacy

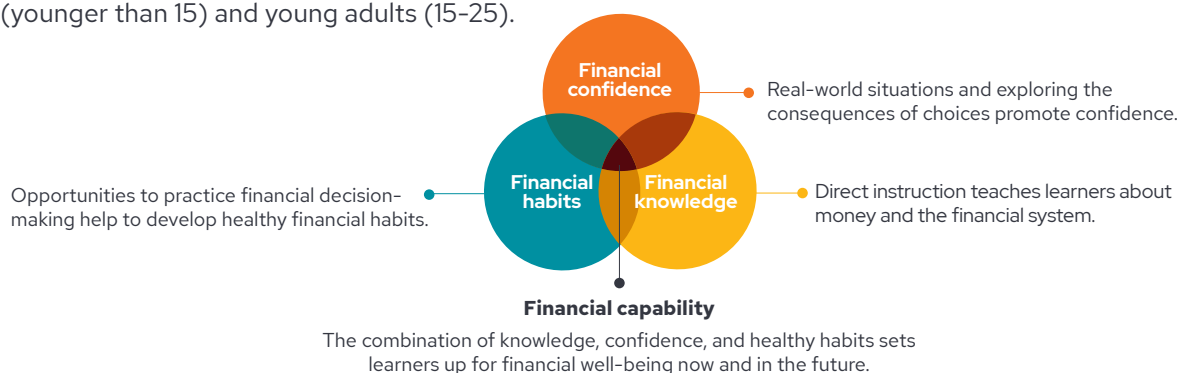
## Learn more about Investnet Institute in Classrooms

### 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 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).

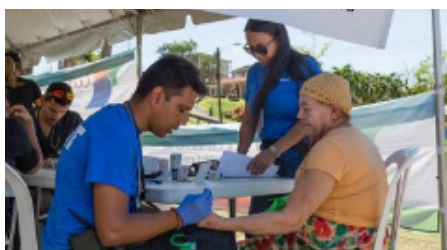


<b>Charity Name</b>	Americares, Stamford, CT
<b>Charity Navigator Rating</b>	★★★★
<b>Mission</b>	For nearly 40 years, Americares has helped communities prepare for, respond to, and recover from disasters in the U.S. and around the world. Their emergency response experts are among the first to respond and stay as long as needed to bring relief to survivors. Americares responds to more than 30 natural disasters and humanitarian crises worldwide each year, establishes long-term recovery projects and brings preparedness programs to communities vulnerable to disasters.
<b>Charity Highlights</b>	<ul style="list-style-type: none"> <li>• Responded to 33 emergencies in 28 countries including the U.S. during 2024.</li> <li>• They provided over \$102 million in medicines and medical supplies to local communities affected by emergencies.</li> <li>• More than 98 percent of all donations directly improve the health of people in need.</li> </ul>
<b>Investnet Commitment</b>	2021-2027
<b>Investnet Annual Giving</b>	\$50,000
<b>Investnet Area of Focus</b>	Social Programs, Disaster Relief

## 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 185 million people annually, and Americares is ready 365 days a year so they can quickly respond.
- **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 underserved 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.





<b>Charity Name</b>	Project HOME, Philadelphia, PA
<b>Charity Navigator Rating</b>	★★★★
<b>Mission</b>	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.
<b>Charity Highlights</b>	<ul style="list-style-type: none"> <li>• <b>H:</b> 1,038 units of permanent, supportive, affordable housing with 315 new residents welcomed HOME.</li> <li>• <b>O:</b> 622 adults received supportive services to achieve career goals, 178 adults completed certificates through Adult Education and Employment Programs.</li> <li>• <b>M:</b> Project Home helps to provide medical care for over 5,000 people at the Stephen Klein Wellness Center and its two satellite locations. They accommodated over 24,000 visits and assisted 352 individuals receiving medical treatment for opioid use.</li> <li>• <b>E:</b> Project Home's K-12 After School Program serves 250+ students and their Adult Education &amp; Employment Program serves 800-1,200 people annually. 100% of College Access Program students graduated from high school and 100% of high school graduates enrolled in post-secondary education.</li> </ul>
<b>Investnet Commitment</b>	2020-2025
<b>Investnet Annual Giving</b>	\$50,000
<b>Investnet Area of Focus</b>	Social Programs

## 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.

Project HOME also provides 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, 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.





<b>Charity Name</b>	The Southern Poverty Law Center, Montgomery, AL
<b>Charity Navigator Rating</b>	★★★★
<b>Mission</b>	The Southern Poverty Law Center (SPLC) was founded in 1971 as a small civil rights law firm. Today, SPLC is internationally known for its tolerance education programs, its legal victories against white supremacists, and its tracking of hate groups.
<b>Charity Highlights</b>	<ul style="list-style-type: none"> <li>• The Southern Poverty Law Center co-sponsored a special education legal clinic which provided training for lawyers interested in representing families, for advocates who help parents navigate the system without an attorney, and for parents who need to know their rights under the law.</li> <li>• Building on its strong foundation of providing educational resources, Learning for Justice is expanding engagement opportunities that center justice in communities, especially in the South. The program publishes a magazine and provides free educational resources – articles, guides, lessons, films, webinars, frameworks, podcasts and more – to foster shared learning and reflection..</li> <li>• The SPLC worked to expose, prevent, counter and remedy hate and extremism, including 1,225 hate groups in the U.S. 4,865 volunteer attorney hours provided free legal aid to those in need.</li> </ul>
<b>Investnet Commitment</b>	2020-2025
<b>Investnet Annual Giving</b>	\$50,000
<b>Investnet Area of Focus</b>	Social Programs

## 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.





<b>Charity Name</b>	Opportunity International, India <b>INDIA PARTNERSHIP</b>
<b>Charity Navigator Rating</b>	★★★★
<b>Mission</b>	By providing financial solutions and training, Opportunity International 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.
<b>Charity Highlights</b>	<ul style="list-style-type: none"> <li>• Opportunity International has 3.6 million loan clients in India who are building businesses to support their families and make sure their children can attend school.</li> <li>• Many of the loans are \$200-\$300 and the repayment rate is 98%. Loan recipients are part of a peer group who ensure the risk of one another's loans.</li> <li>• In India, an impact study found that 89% of women who used a loan for their microbusiness reported up to a 66% increase in their income. And 98% of women reported increased well-being.</li> <li>• In 2024, 63,950 families were reached through health education; 68% of those assisted were women.</li> </ul>
<b>Investnet Commitment</b>	2018-2024
<b>Investnet Annual Giving</b>	\$25,000
<b>Investnet Area of Focus</b>	Social Programs / India

## 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.



<b>Charity Name</b>	Water.org <b>INDIA PARTNERSHIP</b>
<b>Charity Navigator Rating</b>	★★★★
<b>Mission</b>	Water.org is an international nonprofit organization that has positively transformed more than 38 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.
<b>Charity Highlights</b>	<ul style="list-style-type: none"> <li>• In 2024, Envestnet's partnership assisted Water.Org to install 26 water purification plant units benefiting 17,000 people each month.</li> <li>• This important organization accounts for an estimated 15 million liters per year of volumetric water benefit using WRI's method of measurement.</li> <li>• Facilitates a range of potential solutions, including household taps and toilets, rainwater harvesting, water storage, filtration, purification, composting toilets, bio-digestors, piped connections, and properly managed sewage infrastructure.</li> </ul>
<b>Envestnet Commitment</b>	2018-2024
<b>Envestnet Annual Giving</b>	\$25,000
<b>Envestnet Area of Focus</b>	Social Programs / India

## Learn more about Water.org

Today 2.2 billion people lack access to safe water at home, including 703 million without even basic water services. The water crisis negatively affects the health and livelihood of more than one-third of our global population. They exist to change this. WaterCredit uses microfinancing in new ways to bring small, affordable loans to those who need it and access to expert resources to make household water and toilet solutions a reality.

For millions of women, children, and communities, access to safe water can turn problems into potential – unlocking education, economic opportunity, and improved health.





# Annual Corporate Giving



Envestnet provided annual support to the following organizations in 2024.

Envestnet's Annual Corporate Giving program\* is dedicated to creating a positive impact by supporting a wide array of charitable organizations, particularly in education, financial literacy, and aiding those in need. Every year, our employees play a vital role in selecting key causes, and through the Envestnet Charitable Giving Committee, we channel our resources to where they are most needed. Our adaptable contributions allow us to respond to the most urgent challenges in our communities. Together, we're transforming generosity into action and driving real change!

Visit a charity below by clicking their logo!



\*Donations also made in collaboration with our ENV Cares teams.

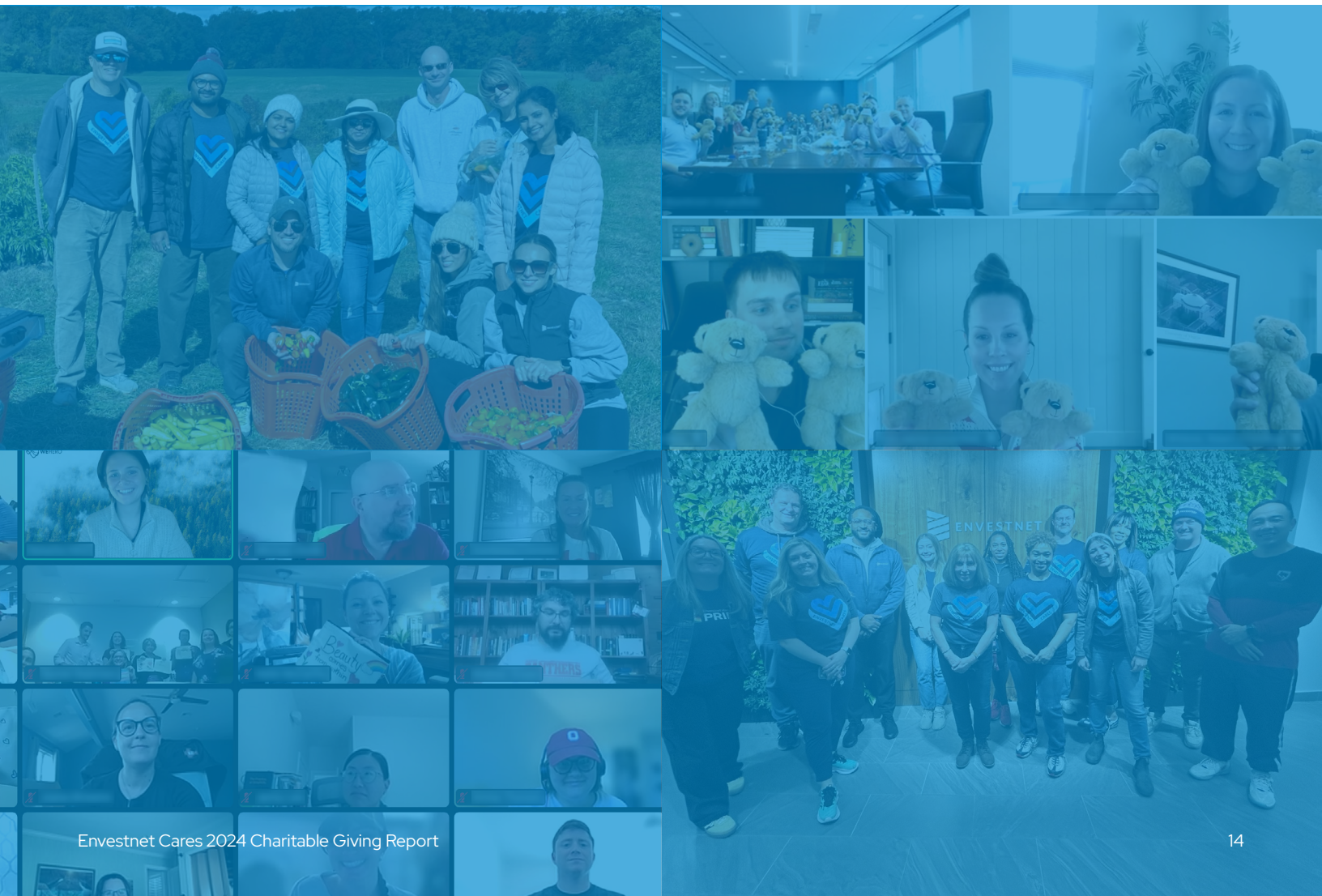
# Investnet Cares –Volunteering



We find that one of the more enjoyable and impactful ways of engaging and connecting our teams is to give back together. This year, Investnet employees assembled bikes for kids in need, habitats for butterflies and bees, care packages for the LGBT community, and food and hygiene packs for seniors, veterans and the homeless. There were trips to food banks, urban farms, yard clean-ups for senior citizens, and trail cleanups near our offices.

We currently have Investnet Cares teams in five locations: Berwyn, Chicago, Denver, Raleigh and Powhatan. Events include visits to clothing donation centers, bikes for kids, cat shelters, local food banks, urban farms, furniture recycling centers, suicide prevention walks and more.

We're proud to partner with WeHero to bring meaningful volunteer opportunities to all our employees – whether they're in the office, working remotely, or somewhere in between! Through virtual, in-person, and hybrid events, we make it easy for everyone to get involved, no matter where they are. These experiences not only strengthen our commitment to social responsibility but also foster deeper connections, engagement, and teamwork across our nationwide workforce.





# Multiplying Employee Giving



At Envestnet, we believe in amplifying the generosity of our employees through our donation matching program. When an employee donates to a registered 501(c)(3) charity, we match their gift dollar for dollar, up to \$3,000 per year. This means every contribution goes twice as far, helping to support the causes our employees care about most. By doubling the impact of each donation, we’re strengthening communities, driving meaningful change, and empowering our employees to make a difference in the world around them..

Throughout the year, Envestnet offers targeted ‘Triple Your Donation’ campaigns with a double employee match to encourage employees to give generously. These special campaigns allowed employees to turn a \$25 donation into \$75 and to donate up to \$1,000 for each cause. In 2024, we supercharged our donation matching program by offering additional support for important causes. We matched donations for organizations focused on Heart Health Month in February, Mental Health Awareness, and ending human trafficking. We also provided extra matching for hurricane relief efforts and contributions to the Make-A-Wish Foundation, helping to create hope and joy for children facing critical illnesses. These initiatives empowered our employees to make an even greater impact in their communities!

Thanks to the Envestnet matching program and special campaigns, Envestnet and our employees collectively contributed approximately \$450,000 in donations.

Since the inception of the program, **Envestnet employees have donated nearly \$2.1M to charities globally!**

