BlackRock Technologies

Integrated With Envestnet's Financial Wellness Ecosystem

We are empowering intelligent, connected financial lives for all investors.

This requires providing advisors like you with access to dynamic solutions that can enable you to assess, review, and improve all aspects of your clients' finances, from today's spending to tomorrow's plans. Integrating some of BlackRock's most popular advisor technologies into the Envestnet platform demonstrates our shared commitment to this mission and should better equip you to help your clients meet their financial goals.

"Envestnet has invested in creating a powerful toolset to deliver better financial guidance to people. By collaborating with BlackRock to offer their technologies, we're able to help our clients support a broader set of consumers throughout all stages of their financial lives, and to do so more completely."

Bill Crager, Co-Founder, CEO, Envestnet

"Our technology creates a common language around how people talk about and construct portfolios. Our partnership with Envestnet positions us to bring that value to a wider audience – improving the daily lives of a greater population of advisors and investors seeking financial wellness and a more connected financial experience."

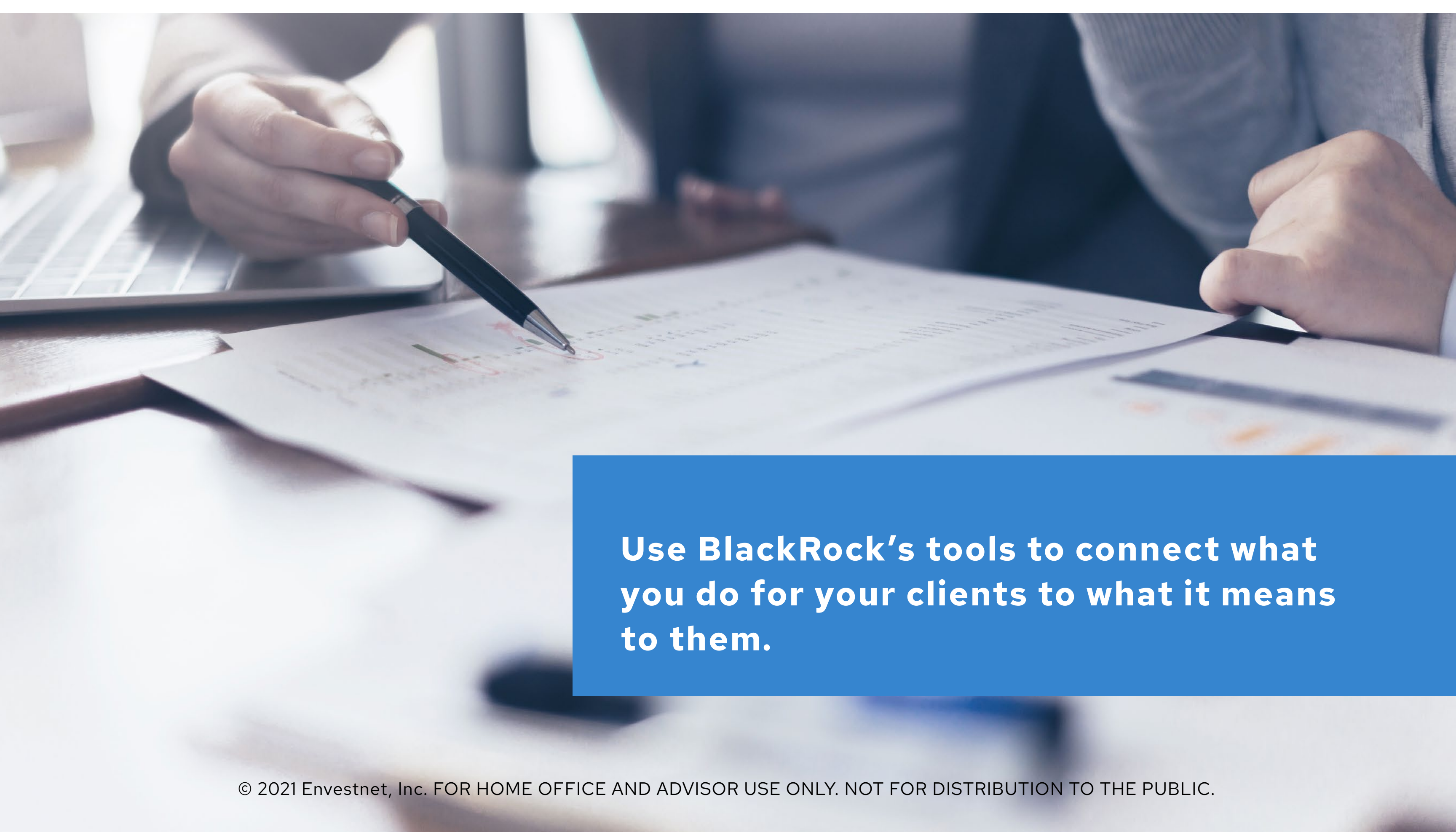
Rob Goldstein, Chief Operating Officer, BlackRock

The tools you need to build stronger relationships, grow your practice, and help your clients achieve intelligently connected financial lives.

Seamlessly integrating BlackRock's advanced, and easy-to-use, tools into the Envestnet platform makes it simple for you to build, manage, and stress test portfolios; create retirement income plans; identify potential tax impacts; and produce reports designed to help clients and prospects understand the value of the advice they receive.

You can expect:

- Powerful prospecting
- Insights to build and manage portfolios
- Client-friendly reports
- Personalized client experiences



Use BlackRock's tools to connect what you do for your clients to what it means to them.

Access Advisor Center and iRetire® through the Envestnet platform.

Advisor Center

Build and manage resilient portfolios.

Advisor Center makes it easy to analyze portfolios, identify potential areas of risk, and consider the potential impact of taxes. Client-friendly outputs highlight the impact you're having on your clients' portfolios and show prospects how working with you could change their trajectory, helping them build the confidence they need to invest, and stay invested, with you.

iRetire

Estimate retirement income in minutes.

Use iRetire as a fast and repeatable way to kick-start the conversation around retirement income. With iRetire, you can illustrate how you'll help clients and prospects navigate the trade-offs in how they save, spend, and invest to and through retirement. The iRetire tool leverages BlackRock's innovative CoRI® technology to help you create a robust and versatile retirement-focused investment plan. Investment selections are monitored using the analytic power of BlackRock's Aladdin® platform, the same risk technology relied on by many of the world's largest financial institutions.

Sample screenshots are for illustrative purposes only.

About Envestnet

Envestnet refers to the family of operating subsidiaries of the public holding company, Envestnet, Inc. (NYSE: ENV). Envestnet is transforming the way financial advice and wellness are delivered. Our mission is to empower advisors and financial service providers with innovative technology, solutions and intelligence to make financial wellness a reality for everyone. Nearly 108,000 advisors and more than 6,000 companies including: 17 of the 20 largest U.S. banks, 46 of the 50 largest wealth management and brokerage firms, over 500 of the largest RIAs and hundreds of FinTech companies, leverage Envestnet technology and services that help drive better outcomes for enterprises, advisors and their clients.

For more information, please visit www.envestnet.com, subscribe to our blog, and follow us on Twitter (@ENVintel) and LinkedIn.

About BlackRock

BlackRock is a global investment manager and our purpose is to help more and more people experience financial well-being. As a fiduciary to investors and a leading provider of financial technology, our clients turn to us for the solutions they need when planning for their most important goals. As of June 30, 2021, the firm managed approximately $9.50 trillion in assets on behalf of investors worldwide. For additional information on BlackRock, please visit www.blackrock.com.

To learn more about how you can leverage our financial wellness platform, including BlackRock's seamlessly integrated offerings, contact your Envestnet sales team at 855-769-0806.

For more information about Envestnet, please visit www.envestnet.com and follow us on social media for news and other updates.

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