ENVESTNET®

Envestnet Advisor Portal

Leverage an enhanced advisor portal with applications that integrate all your client-focused efforts to manage wealth more effectively.

Transforming Wealth Management

As a financial advisor, you face a daily challenge to deliver outstanding advice and service while efficiently managing your business. The Envestnet Advisor Portal streamlines the wealth management process, bringing unparalleled flexibility, accuracy, performance, and value.
Our open-architecture design gives you access to multiple providers, programs, products, and custodians. And, our breadth of solutions and services give you options to integrate as few or as many applications and capabilities according to the particular needs of your business.

Integrated portfolio and practice management

Through the Envestnet Advisor Portal, you can leverage wealth management tools to address your front-, middle-, and back-office needs. Our broad range of innovative technology–analytics, advisory tools, advanced portfolio solutions, and practice management and reporting capabilities–spans everything you need to help deliver better outcomes to your clients.

Advisor Portal

Our Advisor Portal tool set includes:

- Account Aggregation
- Account Opening and Servicing
- Analytics
- Asset Allocation
- Billing and Account Administration
- Communication and Education
- Data Management
- Due Diligence
- Fee Generation
- Financial Planning and Risk Profiling
- Investment Products
- IPS and Compliance
- Reconciliation
- Research
- Performance Reporting
- Portfolio Analysis
- Portfolio Construction
- Portfolio Rebalancing
- Proposal Generation
- Service Requests
- Tax Optimization
- Trading

A Streamlined Wealth Management Process

Developing the Roadmap

Seamlessly design holistic plans, walk through instant ‘what-if’ scenarios, and engage clients with Logix Financial Planning and robust proposal documents.

Making the Right Investment Choice

Build recommendations on a strong foundation of analytical tools and in-depth research by Envestnet | PMC, Envestnet’s portfolio consulting group. You can get unbiased access to a wide array of financial products, including hundreds of asset managers and strategists—many of who are pioneers in the industry. You can also easily search, sort, research, and trade—or outsource investment selection and leverage the advanced solutions from Envestnet | PMC.

Executing and Managing Your Strategy

Make portfolio management and trading decisions for client accounts with automatic monitoring, efficient rebalancing tools, and archivable notes and communications.

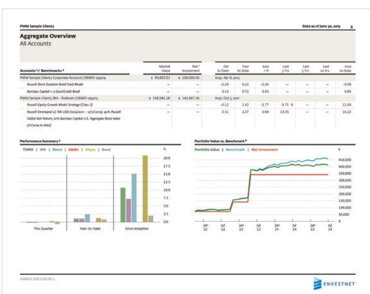
Ongoing Monitoring and Reporting

Create customized, easy-to-read reports that can incorporate data from hundreds of custodians. You can access accurate, reconciled account and practice-level data–every business day.

Dynamic Functionality to Help Build Strong Client Relationships

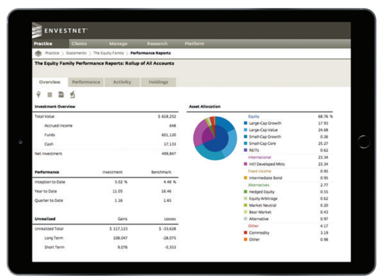
Meeting client expectations can be challenging in an evolving market environment. The Envestnet Advisor Portal gives a competitive edge with various ways to stay connected and engaged with clients.

With the portal's dynamic features, you can experience increased efficiencies with simplified, intuitive navigation that brings key functionality up front; mobility that offers a professional presentation on the go; and deeper customization capabilities that allow you to see only what's most important to you and your clients.



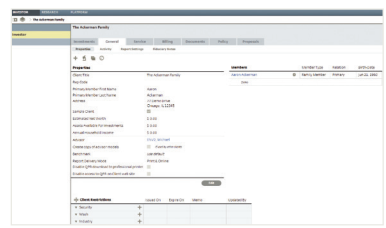
Reports Customized with What Your Clients Want to See

Design customized reports that highlight only what's most important to your clients. Our enhanced graphics add a level of sophistication, and our branding capabilities let you incorporate your distinct look and feel.



From Your Desktop or Mobile Device

No matter where you are, you can deliver presentations and access real-time reporting at your fingertips to share with clients as soon as they request it. The Envestnet Advisor Portal application is available on both iPad and iPhone and android devices including both tablets and phones.



Investor Meeting

Give your clients peace of mind by offering greater transparency into their accounts. With one click, you can switch to "Investor Meeting" mode, and display only the information pertinent to a specific client.

A Complete Wealth Management Platform to Support Advisors

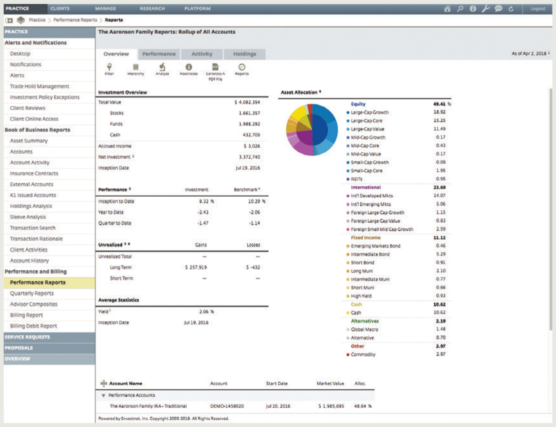
The Envestnet Advisor Portal is organized with you in mind. Across five tabs–Practice, Client, Manage, Research, and Platform–you can leverage the essential tools to streamline wealth management.

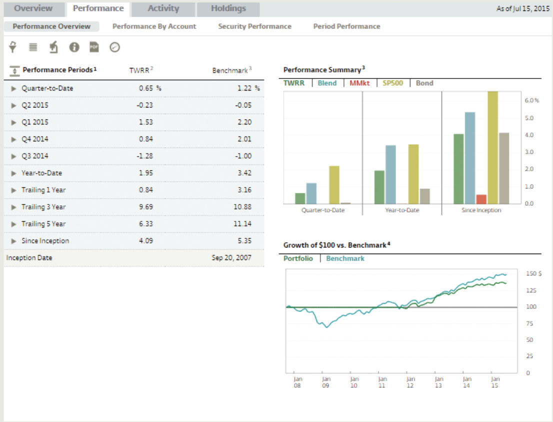
Practice

Access the most frequently used features and important information such as Alerts, Reports, Service Requests, and Proposals

Straightforward, Robust Reporting

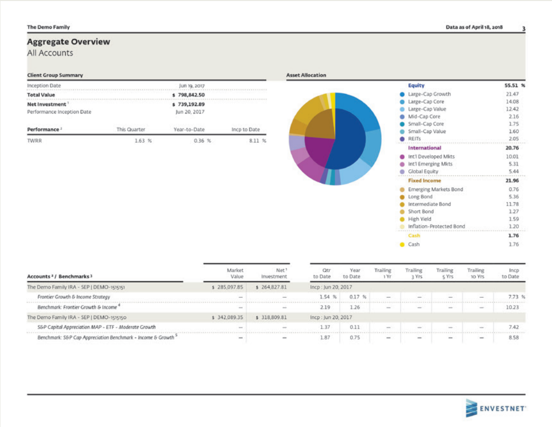
Categorized by Performance, Activity, and Holdings, you now have a more intuitive way of viewing reports. Newly enhanced graphics and deeper data drilldowns provide better insight into your clients' accounts. A rollup of all client accounts gives you a quick snapshot of their investments, including asset allocation, unrealized gains and losses, and other key statistics.

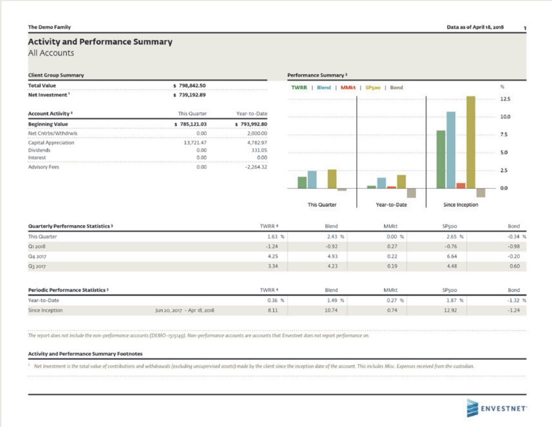




Quarterly Performance Reports

You can view your clients' quarterly reports with just one click within the global toolbar under the Practice tab. You can merge statements, filter for specific reports, and export the QPR to a PDF document. You also can use custom report templates to create and highlight only what's most important to your clients.



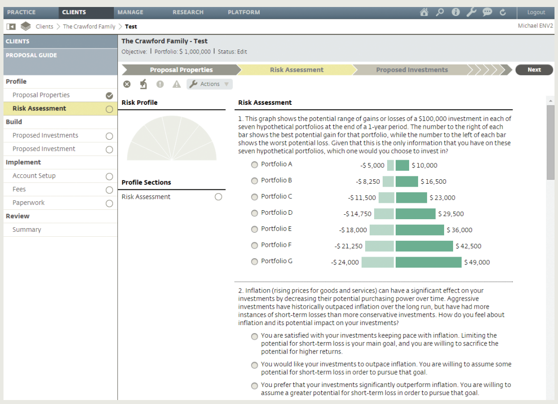


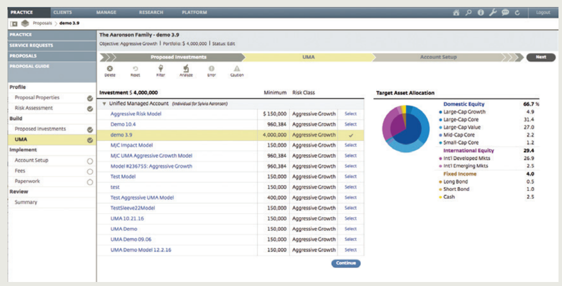
Clients

Review clients' information and generate proposals

A Streamlined Proposal Process

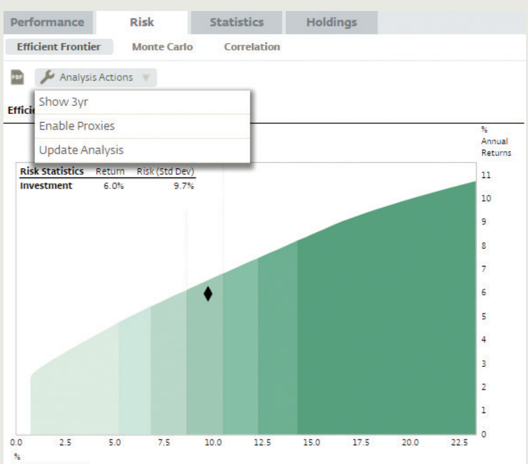
Generate proposals more easily with new enhancements that deliver workflow efficiencies. The proposal process is streamlined to include table functionality—where you can easily tab from one cell to the next. With the Proposal Guide and Workflow Ribbon, you always will know both where you are in the proposal process and what steps have been completed. You can choose to complete the progression either in a straightforward path or toggle among steps in the sidebar. The dropdowns for product selection offer a full menu of all investment options available for that client or prospect, for an added degree of efficiency.

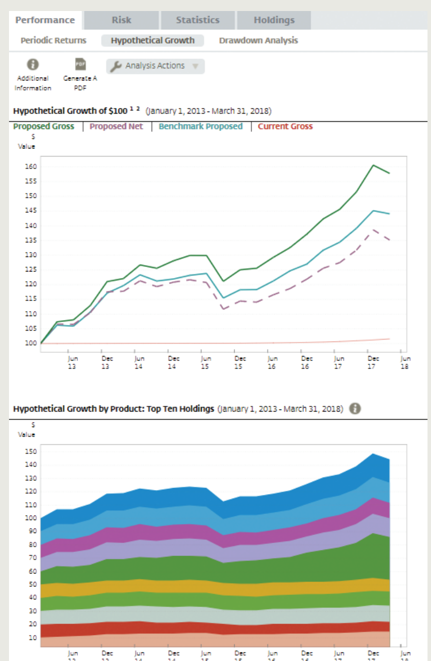




Dynamic Analysis Reports

Within the proposal, you can include different reports that highlight risk analysis based on efficient frontier, a Monte Carlo simulation, or product correlation, and performance analysis by periodic returns, hypothetical growth, or drawdown.



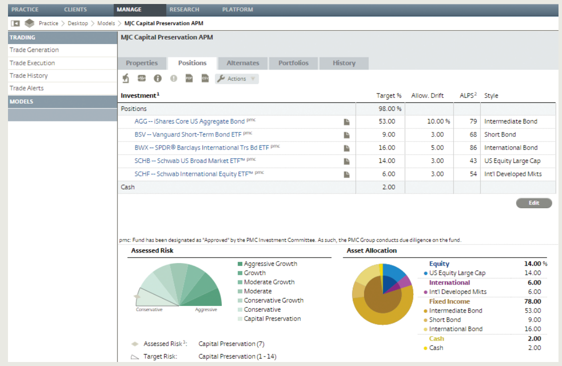


Manage

Create models and manage trades

Efficient, Flexible, Scalable Model Building

The Models section gives you access to the list of models to populate your investment programs. Select your asset allocation and products for each asset class. Create and store asset allocation models for increased guidance and efficiency when building client solutions. Envestnet's extensive network allows you to choose from the industry's broadest selection of equity and fixed income separately managed accounts, fund strategists, stocks, mutual funds, and ETFs to create models for each selected asset allocation.

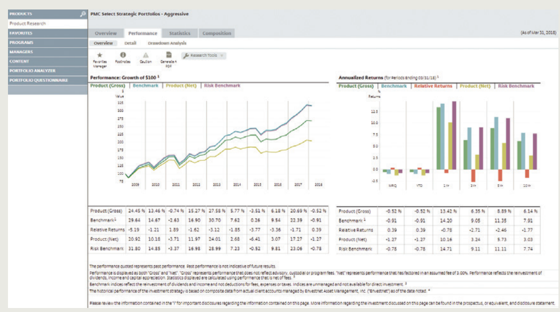


Research

Access Products, Programs, and Managers information

All-inclusive Product Reservoir

Under the Research tab, you can find powerful analytical tools and performance details on all available investment options. You can look for products by filtering with your choice of criteria, add the products to your Favorites list, and group and compare products.

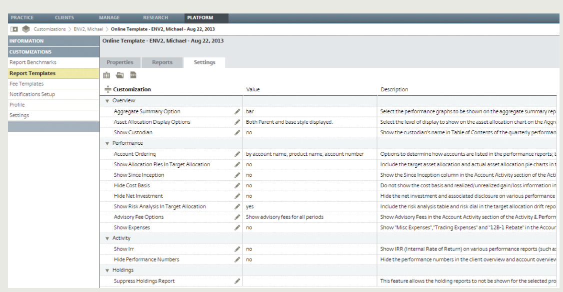


Platform

Obtain training and marketing materials, and create templates and customized reports

Deep Customization Capabilities

Customize your views using the preferences that you need. You can save the layouts and switch between them as needed. Create favorites and custom report templates to access quickly the information you and your clients track.



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For more information about the Envestnet Advisor Portal, email us at envestnet.platform@envestnet.com.

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