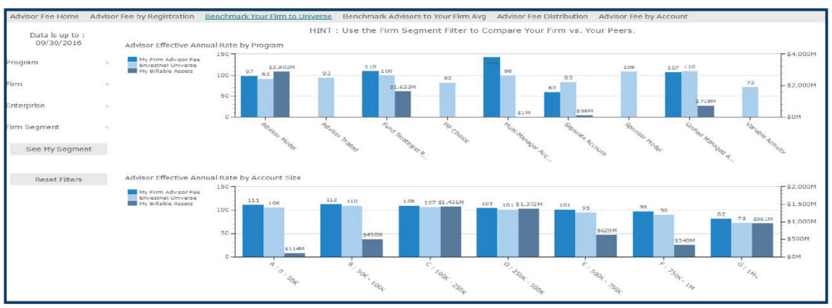
ENVESTNET®

EnterprisePortal

Fees and Benchmarking Dashboards

Using our team of data engineers, scientists, and analysts, we work with the vast amount of data in 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 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.



Our Fees and Benchmarking Analytics will provide you with critical information that will help you make sure your advisor and client total fees are competitive, consistent, and comply with your policies. The dashboards will illustrate your fees by important dimensions: Program Type, Size of Account, Age of Account, and Retirement vs. Non-Retirement Account at the advisor and account levels.

Benchmarking will allow you to compare account level fees across advisors within your firm, against your industry segment, and against the industry as a whole.

To accomplish this, we have created a fee panel of stable account records so that the resulting benchmarks are truly representative of how fees are being set by advisors.

What Can You Do?

- Help advisors set competitive fees
- Ensure you address any regulatory fee issues
- Analyze your fees for compliance purposes

Key Users

- Executives
- Compliance
- Sales

Further Information

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