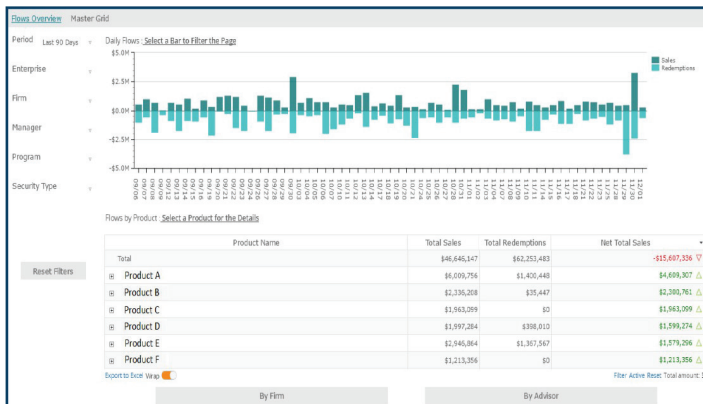


ManagerSolutions

Advanced Dashboards

Advanced Analytics is an add on to the base Manager Portal.

We created the Advanced Dashboards on the Manager Portal for firms that are focused on growing their business. With the Advanced Dashboards, you have daily insight into your sales and redemptions and can gain unprecedented understanding of your opportunities for each of your product types. This deeper, more detailed view of your firm will allow you to quickly see how you stack up against the rest of the Envestnet ecosystem, and more importantly, show you what you need to do to lead the pack.



All Basic Dashboards Plus:

- Daily Sales and Redemptions
- Advanced Advisor Analytics
- Sales and Redemptions by Account (CRD)
- Advanced Opportunity, including FSP, ETF, and Funds
- Robust Fee Analysis
- Assets, Availability, and Fees
- Competitive Performance

What Can You Do?

- Get Daily Sales and Redemptions to Improve Sales Follow Up
- See How You Stack up to Competitors
- Set Competitive Product Pricing
- See Who is on Envestnet Platform
- Get These Dashboards in Salesforce
- 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

Bryan Curran
 BCurran@WheelhouseAnalytics.com
 484.881.3009

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 statements herein are based upon the opinions of Envestnet and third party sources. Information obtained from third party resources are believed to be reliable but not guaranteed. All opinions and views constitute our judgments as of the date of writing and are subject to change at any time without notice. This document refers to information, products or services that, currently or in the future, may be developed, internally (or by receiving information from other parties in connection with such development activities or otherwise). Accordingly, nothing in this document should be construed as a representation or agreement by Envestnet to develop, or have developed for it, any information products or services (including, without limitation, concepts, systems or techniques).

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