



FOR IMMEDIATE RELEASE

Investnet | PMC Offers Access to CAIS for Delivery of Alternative Investment Funds to Advisors

*Strategic Initiative Creates Premier Wealth Management Solution for Accessing and
Researching Third-Party Hedge Funds and Private Equity Funds*

Chicago, IL—November 11, 2015—Investnet | PMC, the Portfolio Management Consultants group of Investnet, Inc. (NYSE: ENV), has partnered with CAIS to make available to independent advisors access to third-party hedge funds and private equity funds.

More than 43,000 advisors utilize Investnet's technology and services to collectively manage \$788 billion in assets and over 3.2 million client accounts, as of September 30, 2015. CAIS member firms, which include RIAs, broker-dealers, and family offices, have transacted approximately \$3 billion across the CAIS platform in a broad array of alternative investment funds and capital markets offerings.

"Our alliance with CAIS stems from our commitment to delivering innovative products and information that advisors need to help improve client outcomes," said **James Patrick, Executive Vice President of Investnet | PMC**. "As investor demand for alternative investment strategies continues to increase, RIAs and other advisors that rely on Investnet can obtain streamlined access to previously unavailable funds and research through CAIS, a trusted third-party platform."

The staged rollout for the integration is expected to begin in December 2015. Investnet clients will have single-sign-on access to a secure CAIS portal within the next-generation ENV 2 system. Advisors will be able to obtain product reports about the hedge funds and private equity funds on the CAIS platform, as well as white papers and other educational materials about the broader alternative investment universe. In addition, advisors will be able to conduct electronic fund transactions on the CAIS platform through a single-sign-on process from ENV 2.

"We are always looking to expand CAIS's impact with industry leading partners and bring greater value to the advisors we serve," said **Matt Brown, Founder and CEO of CAIS**. "Our alliance with Investnet helps provide a competitive advantage to Investnet clients by granting them streamlined access to a broad menu of alternative investment funds."

"Our advisors rely on Investnet and CAIS for sophisticated solutions to help clients achieve their financial goals," said **Elliot Weissbluth, Founder and CEO of HighTower**. "The integration between these two platforms offers advisors a simple, secure way to access alternative investment products and data to address clients' diverse wealth management needs."

"CAIS continues to integrate with the most important players in the wealth management ecosystem, like Investnet, HighTower, and Fidelity, to provide a seamless experience for



advisors to incorporate alternatives into their clients' portfolios," said **Tim Shannon, President of CAIS**. "We share a common goal to make it easier for independent financial advisors to add value for their clients."

CAIS provides access to a diversified menu of private funds at lower investment minimums, and offers integrated custodial reporting and electronic subscription processing. All funds on the CAIS platform have undergone independent due diligence by Mercer.

"As a provider of end-to-end wealth management solutions, Investnet doesn't only create technology applications and facilitate workflow automation—it also offers select integrated access to investment products and data from third parties like CAIS," said **Ryan Tagal, Director of Product Management at Investnet | PMC**. "We are proud that advisors will be able to harness CAIS's alternative investment funds and market research for their clients through the Investnet network."

About Investnet | PMC

Investnet, Inc. (NYSE: ENV) is a leading provider of unified wealth management technology and services to investment advisors. Our open-architecture platforms unify and fortify the wealth management process, delivering unparalleled flexibility, accuracy, performance, and value. Investnet solutions enable the transformation of wealth management into a transparent, independent, objective, and fully-aligned standard of care, and empower advisors to deliver better outcomes.

Investnet | PMC provides independent advisors, broker-dealers, and institutional investors with the research, expertise, and investment solutions—from due diligence and comprehensive manager research to portfolio consulting and portfolio management—they need to help improve client outcomes.

For more information on PMC, please visit [Investnet | PMC](#) and follow @ENVintel (<https://twitter.com/envintel>).

About CAIS

CAIS (www.caisgroup.com) is a leading financial product platform offering wealth management professionals access to a diversified menu of funds and other products. CAIS provides streamlined execution to an expanding list of alternative investment funds, IPOs and follow-ons, structured notes and real assets. CAIS delivers a suite of portfolio construction and reporting tools, and complements its fund offering with independent due diligence provided by Mercer.

CAIS Capital LLC is a registered broker-dealer, member [FINRA](#), [SIPC](#).

CAIS and Investnet are unaffiliated entities.



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