

Investnet Announces New Partnership with D.A. Davidson & Company

CHICAGO, May 8, 2018 – Investnet announced today that D.A. Davidson & Co., an employee-owned full service investment firm headquartered in Montana, will implement Investnet’s comprehensive integrated platform, supporting D.A. Davidson’s \$41.5 billion in assets and approximately 400 advisors.

“Investnet is thrilled with the opportunity to partner with a firm of the caliber of D.A. Davidson,” said John Yackel, Executive Managing Director at Investnet. “The new partnership will enhance the client and advisor experience while delivering scale and efficiencies to the home office at D.A. Davidson.”

D.A. Davidson will be revamping its advisory platform with Investnet’s robust software solutions — data analytics, fiduciary solutions, portfolio accounting tools, and performance reporting to name a few — that empower advisors to deliver better client outcomes. Advisors will have access to advanced technology integration, including comprehensive financial tools and digital advice technology to help them better engage with clients, as well as streamline and enhance advisors’ daily practice.

“This partnership reinforces our continued drive to put clients first by providing our financial advisors with access to Investnet’s innovative integrated technology, data and planning tools,” said Tim Austin, Chief Operations & Information Officer, D.A. Davidson.

“These investments enable our current advisors to enhance their practice of managing wealth, as well as allow us to attract more advisory-based financial advisors in the future,” said Joely Meighan, SVP Director of Managed Assets.

The Investnet platform will be available to D.A. Davidson financial advisors in the fall.

About D.A. Davidson

D.A. Davidson Companies is an employee-owned financial services firm offering a range of financial services and advice to individuals, corporations, institutions and municipalities nationwide. Founded in 1935 and headquartered in Montana, with corporate offices in Denver, Los Angeles, Portland and Seattle, the company has more than 1,300 employees and offices in 26 states.

Subsidiaries include: D.A. Davidson & Co., the largest full-service investment firm headquartered in the Northwest, providing wealth management, investment banking, equity and fixed income capital markets services and advice; Davidson Investment Advisors, a professional asset management firm; D.A. Davidson Trust Company, a trust and wealth management company; and Davidson Fixed Income Management, a registered investment adviser providing fixed income portfolio and advisory services. For more information, visit dadavidson.com or Twitter: [@DADavidsonCo](https://twitter.com/DADavidsonCo).

About Investnet

Investnet, Inc. (NYSE: ENV) is a leading provider of intelligent systems for wealth management and financial wellness. Investnet’s unified technology enhances advisor productivity and strengthens the wealth management process. Investnet empowers enterprises and advisors to more fully understand their clients and deliver better outcomes.

Investnet enables financial advisors to better manage client outcomes and strengthen their practices. Institutional-quality research and advanced portfolio solutions are provided through Investnet | PMC, our Portfolio Management Consultants group. Investnet | Yodlee is a leading data aggregation and data

analytics platform powering dynamic, cloud-based innovation for digital financial services. Envestnet | Tamarac provides leading rebalancing, reporting and practice management software for advisors. Envestnet | Retirement Solutions provides an integrated platform that combines leading practice management technology, research, data aggregation and fiduciary managed account solutions.

More than 59,000 advisors and 2,900 companies including: 16 of the 20 largest U.S. banks, 39 of the 50 largest wealth management and brokerage firms, over 500 of the largest Registered Investment Advisers, and hundreds of Internet services companies, leverage Envestnet technology and services. Envestnet solutions enhance knowledge of the client, accelerate client on-boarding, improve client digital experiences and help drive better outcomes for enterprises, advisors and their clients. For more information on Envestnet, please visit www.envestnet.com and follow @ENVintel.

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