



Investnet Enables Firms to Meet Growing Client Expectations on a Broader Fiduciary Standard

The Company's Latest Technology Enhancements Release Focuses on Helping Advisors Navigate and Thrive in a Shifting Advisory Services Landscape and Delivers a Comprehensive Fiduciary Toolkit

CHICAGO—January 24, 2017—The Trump administration has issued a memo to all federal departments and agencies to freeze indefinitely rulemakings not yet finalized and to delay by 60 days implementation of those rules finalized but not yet implemented, including the Department of Labor's (DOL) Fiduciary Rule. The DOL has not yet released specific guidance on the impact to the Fiduciary Rule, which raises an important question for advisors: Should they pursue a business model that responds to the digital, demographic and economic pressures reshaping it, or breathe a sigh of relief and return to business as usual? Despite the anticipated delay, Investnet, Inc. (NYSE: ENV) says that financial advisors and enterprises have opportunities to provide a fiduciary standard of advice that clients are increasingly expecting. With its latest technology enhancement release Investnet is empowering advisors to capitalize on the fiduciary opportunity and to foster more engaged relationships with clients.

Investnet is seeing massive market and consumer forces that are reshaping the way advice is being delivered. "Investors increasingly expect that advisors will act in their best interest," said **James Lumberg, Executive Vice President of Investnet**. "There is a great deal of momentum behind implementing a broader fiduciary standard. Aside from evolving regulatory requirements, other market and consumer pressures such as growing client demands for fee transparency, the rise of digital-advice, goal-based investment planning, and product innovations all contribute to an anticipated shift in how advisors of the future will run their businesses."

Investnet offers innovative technology solutions and consulting services to empower enterprises and advisors to deliver programs for both managed and transactional accounts that reinforce a fiduciary standard that elevates their value propositions. The technology enhancements continue a track record and commitment to provide industry leadership in delivering solutions that empower advisors in an ever evolving market and regulatory environment. **Live demonstrations of these offerings will be available at the FSI OneVoice Conference today and Thursday at the Investnet booth #417.**

Investnet's Fiduciary solutions include the following:

Best Interest Assessment: Determining the client's best interest requires a comprehensive understanding of their financial situation, objectives, and long-term goals. Through Investnet's Advice Logix planning solutions, as well as through other integrated third-party planning providers, advisors can leverage integrated tools with aggregated account data that enables them to assess client needs and determine solutions that are in their clients' best interest, accelerate the on-boarding process and streamline workflows.

Product Shelf Development: Investment Consultants from Investnet | PMC provide outsourced chief investment officer (CIO) support to enterprises and advisors to help develop compliant investment portfolios and programs for both managed and transactional accounts.

Account Documents and Disclosures: Enhancements to Investnet’s new account and proposal technology enable firms to meet potential Fiduciary Rule requirements for account documentation and disclosures. These enhancements include:

- Best Interest Contract Provisions and Disclosures
- Investment Product and Program Expense Analysis
- Fee Rationalization Illustrations
- New Account Documentation and Retention

Data Management & Analytics: Investnet’s Vantage enterprise-level data aggregation solutions, combined with the data analytics and visualization capabilities of Investnet Analytics, deliver efficient and timely visibility into all the investment products in service at an enterprise. This comprehensive oversight and surveillance tool is critical to help bring legacy assets into compliance with the potential Fiduciary Rule as well as provide ongoing monitoring.

“With Advice Logix, our enhanced data management and analytics capabilities, the Investnet Advisor Suite Platform allows enterprises and advisors to configure solutions in a customized way that is in the best interest of investors,” said **James Patrick, Executive Vice President and Head of Advisor Services at Investnet**. “As we hear more feedback from our clients, we are committed to making continued platform enhancements to ensure that advisors have all the tools and resources necessary to support a fiduciary standard and overcome market complexities.”

Additional resources and information about Investnet’s Fiduciary Solutions is available at <http://www.investnet.com/fiduciary>.

About Investnet

Investnet, Inc. (NYSE: ENV) is the leading provider of intelligent systems for wealth management and financial wellness. Investnet’s unified technology enhances advisor productivity and strengthens the wealth management process, delivering unparalleled flexibility, accuracy, performance, and value. Investnet enables a transparent, independent, objective, and fiduciary standard of care, and empowers enterprises and advisors to more fully understand their clients and deliver better outcomes.

Investnet’s Advisor Suite 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, personalized financial apps and services for millions of consumers. Investnet | Tamarac provides leading rebalancing, reporting, and practice management software for advisors. Investnet | Retirement Solutions provides retirement advisors with an integrated platform that combines leading practice management technology, research and due diligence, data aggregation, compliance tools, fiduciary solutions and intelligent managed account solutions.

More than 52,000 advisors and 2,500 companies including: 16 of the 20 largest U.S. banks, 38 of the 50 largest wealth management and brokerage firms, over 500 of the largest Registered Investment Advisers, and hundreds of Internet services companies, leverage Investnet technology and services. Investnet 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.

Information provided should not be construed as legal or regulatory advice or guidance.

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