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Investnet Tops 2024 'Wealthies' Finalists List With Seven Nominations

Recognition Spans 'All-In-One' Platforms, Innovation, Direct Indexing, Retirement, and Annuities Showcasing Investnet's Comprehensive Solutions and Integrations

BERWYN, Pa., Aug. 27, 2024 /PRNewswire/ -- Investnet (NYSE: ENV), a leading provider of integrated technology, data intelligence, and wealth solutions, announced that its ecosystem has been recognized as a finalist for seven 2024 Wealth Management Industry Awards ("Wealthies"). Investnet's ecosystem received the highest number of finalists from a field of more than 1,000 entries across over 400 companies when including its Exchanges.



To view the full list of finalists, please visit: <https://informaconnect.com/wealth-management-industry-awards/2024-finalists/>.

"Investnet is honored by this recognition, which reflects our unwavering commitment to empowering financial advisors through our integrated wealth management platform. Our nominations across diverse categories underscore the breadth and innovation of the Investnet ecosystem," said **Molly Weiss, Group President, Wealth Management Platform, Investnet**. "We're also excited that Advisor Credit Exchange, which powers the Investnet Credit Exchange, is a finalist in two categories, recognized for its innovation in enabling financial advisors to seamlessly manage clients' cash and credit alongside investments."

Celebrating its tenth year in September, the Wealthies recognize top companies, individuals, and organizations dedicated to supporting financial advisor success. Investnet has been named a finalist this year for the following innovations, reinforcing the holistic solutions and platform it delivers for financial advisors:

Quantitative Portfolios (CATEGORY: Direct Indexing for Asset Managers): Investnet's Quantitative Portfolios (QPs) are its internally managed direct indexing solutions for advisors available on its platform. QRG Capital Management, Inc., an Investnet subsidiary, drives the QPs with its research framework, construction techniques, and portfolio management experience. Over the past three years, Investnet's QPs offerings have grown by 40% annually in accounts and advisors. Since its launch in 2013, direct indexing has become the

most popular separate account strategy across the Investnet ecosystem.

Access to Annuities via the Insurance Exchange (CATEGORY: Insurance): The Investnet Insurance Exchange, powered by Fiduciary Exchange, LLC (FIDx), gives access to many types of annuities, enabling advisors to deliver fully integrated advice through Investnet's ecosystem. It provides end-to-end management of annuity solutions through the Investnet platform so that advisors can seamlessly plan, research, propose, open, and actively manage annuities from leading carriers. A prominent registered investment adviser began using the Investnet Insurance Exchange in 2022 and created a proprietary advisory annuity for its advisors. Since then, they've expanded the use of the platform to include more than 600 active advisors, with an average of 22 new users each month.

Retire Complete (CATEGORY: 401(k) Technology for Retirement Plan Support and Advisor Services): In November 2023, Investnet deepened its relationship with Empower to launch Retire Complete, a turnkey digital 401(k) solution offering retirement plan sponsors access to high-quality plans within minutes. Investnet Retire Complete can support advisors and their business owner clients in the retirement market, combining Investnet's fiduciary guidance and investment due diligence with Empower's personalized communications and investments, to help more employers provide competitive 401(k) plans. This solution creates an opportunity for advisors to help businesses deliver value to their employees—while helping to address fiduciary concerns and service challenges associated with running a retirement plan, enabling more organizations to offer a competitive benefits package for attracting and retaining top talent.

Investnet Wealth Management Platform (CATEGORY: Innovation Platforms): Investnet has transformed the way fee-based financial advice is delivered through its Wealth Management Platform. Serving the wealth management industry for 25 years with more than \$6 trillion in platform assets, Investnet is helping to lead the growth of wealth managers and transforming the way financial advice is delivered through its ecosystem of integrated technology, advanced insights, and comprehensive solutions. It is positioned to help advisors adapt to changes in how essential advice is defined and delivered.

Investnet Wealth Management Ecosystem (CATEGORY: Unified (All-In-One) Systems): Investnet refines its ecosystem to empower advisors and enterprises, aiming to enable them to maximize the value they deliver to clients. Investnet has been at the forefront of the wealth management industry for 25 years, offering essential tools and support to empower financial advisors. With a wide range of services including TAMP, and through partnerships, access to insurance, credit, trust services, and alternatives, Investnet's ecosystem caters to the diverse needs of clients. Leveraging 100+ data insights, with millions of specific account incidents, advisors can enhance client service delivery and bring efficiency to their practices. Investnet's commitment to improving advisors' daily experiences drives it to innovate, providing technology-driven solutions that help foster growth, productivity, and deeper client engagement.

In addition to being named a finalist in these categories, the Advisor Credit Exchange (ACE), which powers the Investnet Credit Exchange, was named a finalist in two categories. The winners for this year will be announced at a black-tie ceremony on September 5, 2024, at the Ziegfeld Ballroom in New York City.

About Investnet

Envestnet is helping to lead the growth of wealth managers and transforming the way financial advice is delivered through its ecosystem of connected technology, advanced insights, and comprehensive solutions – backed by industry-leading service and support. Serving the wealth management industry for 25 years with more than \$6.2 trillion in platform assets—more than 110,000 advisors, 17 of the 20 largest U.S. banks, 48 of the 50 largest wealth management and brokerage firms, more than 500 of the largest RIAs -- thousands of companies, depend on Envestnet technology and services to help drive business growth and productivity, and better outcomes for their clients. Data as of 6/30/24.

Envestnet refers to the family of operating subsidiaries of the public holding company, Envestnet, Inc. (NYSE: ENV). For a deeper dive into how Envestnet is shaping the future of financial advice, visit www.envestnet.com. Stay connected with us for the latest updates and insights on [LinkedIn](#) and [X \(@ENVintel\)](#).

Through its ACx technology, Advisor Credit Exchange, LLC (“ACE”) provides access to lending solutions for advisors’ clients via the Envestnet Platform through Envestnet Asset Management’s affiliate, Envestnet Financial Technologies. Envestnet, Inc. has a financial interest and occupies board of director positions in ACE. Neither ACE nor Envestnet offers any loan products or makes any lending decisions. The funding and administration of all loans is undertaken by separate and unaffiliated financial institutions. This press release should not be construed as a recommendation or endorsement of any particular product, service, bank or firm.

Plan sponsors will always retain some fiduciary responsibility and should therefore conduct their own initial and ongoing research and due diligence on third party service providers, including but not limited to trustees, investment managers, recordkeepers and third party administrators.

The Wealthies are awarded to the firms and individuals who are bringing new innovations to market that make a real difference to the daily activities of financial advisors. Over 1,000 entries received from more than 400 companies were considered by the Wealthies judging panel. Neither Envestnet nor its affiliates paid any fees to be considered and this award is not indicative of Envestnet, nor any of its affiliates, partners, or subsidiaries future performance. The awards will be granted in September 2024 with evaluation based on the previous 18 months.

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