

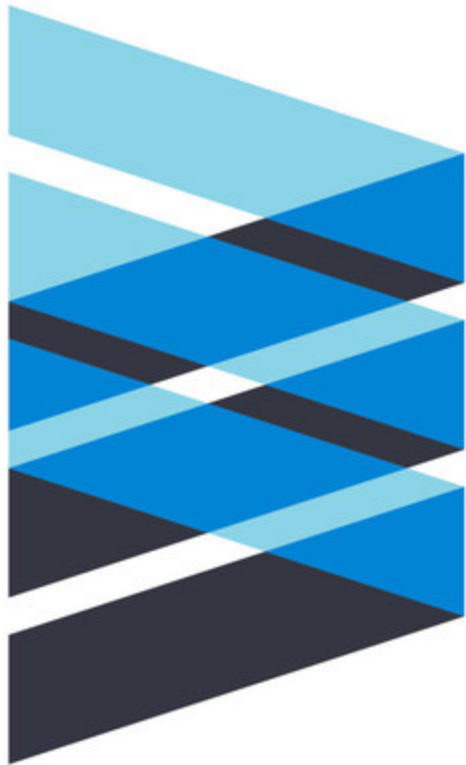
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Envestnet and YieldX Announce Strategic Partnership, Expanding Access to Solutions for Simplifying Investment in Income and Protection Products

Through Investment in YieldX's Tools, Envestnet Empowers More Advisors to Help Clients Meet Income Needs

CHICAGO and MIAMI, Oct. 25, 2021 /PRNewswire/ -- [Envestnet](#), one of the largest ecosystems transforming the way financial advice and wellness are delivered, and [YieldX](#), a FinTech company reimagining fixed income, today announced they are entering into a strategic relationship. Envestnet will distribute YieldX technology and products through its platform, empowering advisors to help clients achieve better fixed-income investment outcomes. Completing a year of significant growth and opportunity, YieldX also closed its round of Series A funding led by Envestnet.



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"We are fully vested in enhancing our ecosystem to intelligently connect financial lives, and we believe income and protection solutions are critical to helping make financial wellness a

reality," said **Rich Aneser, Chief Strategy Officer of Investnet**. "Through our strategic partnership with YieldX, and investing to expand its capabilities, we are able to bring more income related solutions to market for helping advisors meet a critical client need."

The investment made by Investnet will be used to further scale YieldX's quant, engineering, and analytics teams in order to support the company's vision of bringing sophisticated fixed income investment capabilities to a much larger universe of investors. Additionally, YieldX plans to expand its API suite to facilitate personalization at scale on a modern technology stack, add new data and integrations, expand existing ESG (environmental, social, and governance) and impact customization capabilities, and further execute on the go-to-market strategy across various use cases.

Investnet and YieldX are acting on the opportunity to simplify fixed income investing for the nearly 108,000 advisors and more than 6,000 companies currently harnessing Investnet's technology and services. The partnership with YieldX complements the suite of income and protection tools available through the Investnet ecosystem—such as access to variable annuities from insurance carriers, and FIDx's Protection Intelligence solution for actively managing annuities, offered through the Investnet Insurance Exchange.

"Upon recognizing the alignment in our visions for the future of wealth and financial technology, we saw an exciting opportunity to work with Investnet," said **Adam Green, Co-Founder and CEO of YieldX**. "The depth of the Investnet ecosystem and the breadth of its share across several key markets is impressive. We view this strategic partnership as a powerful way to level the fixed income playing field for Investnet's broad network of advisors and end investors with solutions that simplify the traditional complexities of sourcing and trading fixed income assets. We believe the power of our solutions can make a meaningful impact upon the financial futures of investors."

YieldX was founded in April 2019 to eliminate historically complex barriers to sophisticated fixed income investing. The YieldX solutions enable:

- **FinTechs** to create investment and savings products around targeted yield and risk parameters, and do so on-demand.
- **Wealth Managers** to improve client outcomes by utilizing YieldX's "no quant" workflows to build and optimize yield portfolios.
- **Broker Dealers** to deliver intelligent insights, trade ideas, and portfolio optimizations at scale.
- **Asset Managers** to offer white-label "direct indexing" fixed income technology that provides investors with customized, values-based investment solutions.

About Investnet

Investnet refers to the family of operating subsidiaries of the public holding company, Investnet, Inc. (NYSE: ENV). Investnet is transforming the way financial advice and wellness are delivered. Our mission is to empower advisors and financial service providers with innovative technology, solutions, and intelligence to make financial wellness a reality for everyone. Nearly 108,000 advisors and more than 6,000 companies—including 17 of the 20 largest U.S. banks, 46 of the 50 largest wealth management and brokerage firms, over 500 of the largest RIAs, and hundreds of FinTech companies—leverage Investnet technology and services that help drive better outcomes for enterprises, advisors, and their clients.

For more information, please visit www.envestnet.com, subscribe to our [blog](#), and follow us on Twitter ([@ENVintel](#)) and [LinkedIn](#).

About YieldX

YieldX is reimagining fixed income. YieldX offers a digital-native API-first analytics and modeling platform. Our 'no quant' apps are transforming the way everyone from wealth managers to broker-dealers and fintech apps design and deliver optimized, personalized income investing solutions at scale. YieldX offers complete flexibility, with a choice of end-to-end technology and asset management solutions, custom investment universes, and white-labeled offerings, so clients can select the capabilities that best meet their needs.

For more information, visit YieldX.app.

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SOURCE Envestnet, Inc.; YieldX