May 11, 2022

The Intelligent Financial Life™ Takes Center Stage at 2022 Envestnet Advisor Summit

Premier Industry Event Spotlights New Insights, Technology & Solutions that Create a Unified and Unrivaled Financial Wellness Ecosystem

BERWYN, Pa., May 11, 2022 /PRNewswire/ -- The 2022 Envestnet Advisor Summit – Envestnet's premier industry event – is currently underway at the Charlotte Convention Center in Charlotte, NC., this year connecting more than 2,000 attendees in-person from across the country. The event spotlights the many new innovations and investments Envestnet has made to fuel its ecosystem, including value-add solutions, efforts to modernize the digital marketplace, and ways the firm is opening its ecosystem to even more providers.

"Envestnet is delivering a uniquely scaled digital and data driven ecosystem to enable the industry to meet the rapidly evolving needs of the consumer towards a hyper-personalized, intelligently connected financial life," said **Bill Crager, Co-Founder and CEO of Envestnet** "We couldn't be more excited to come together with our advisors and partners at this year's Advisor Summit to demonstrate our focus on innovation and the continued evolution of this ecosystem through new technology, solutions and intelligence. The new digital and data-driven experiences we're providing offer a holistic approach to wealth and drive client engagement and action – transforming not only advisors' practices, but the entire industry."

Innovations and announcements being unveiled at Envestnet's Advisor Summit include:

Truelytics Acquisition: In keeping with Envestnet's strategy to further connect its ecosystem by creating transformative progress for advisors and their clients, the company announces its acquisition of Truelytics, an Advisor Transition Management platform and the first end-to-end data-driven system to help wealth management and insurance enterprises attract, grow, and retain advisory businesses, while also reducing the costs related to advisor transitions. The Truelytics platform combines Envestnet data, analytics, and wealth technology to further support advisors across the ecosystem. Terms of the deal were not disclosed and not expected to have a material impact on Envestnet's results of operation or financial condition.

Envestnet Wealth Data Platform: A cloud-based data intelligence solution for wealth advisory firms, connecting the data across an advisor's practice to activate and unlock value – all while surfacing new insights to execute across an advisor's entire business. This platform brings together portals that support advisors and small business, as well as data management, business intelligence and next best action to power decision intelligence at scale and help advisors grow their business and meet the rapidly evolving needs of their clients.

Next-Generation Client Portal: Offering a single, data-driven, highly configurable and connected view of a client's entire financial life, the new interface provides personalization at scale enabling advisors to customize the client journey for multiple personas, from mass market to ultra-high net worth. This digital experience allows for more transparency during planning sessions, gives clients real-time access to their entire financial life any time on any device, and it makes things easy. The user experience is straightforward, modern, and intuitive.

Envestnet Developer Portal: A streamlined, modern developer experience that unifies the technology and application programming interfaces (APIs) for Envestnet's entire ecosystem. Clients leveraging multiple solutions across Envestnet now have quick access to public and restricted developer content to rapidly onboard and deploy new technologies. Developers can also leverage easy-to-use tools, training materials and services to build, test, and launch new financial solutions. Click here to learn more about Envestnet's updated developer portal.

Impact Assessment and Next Best Dollar MyBlocks: New offerings within the Envestnet | MoneyGuide's MyBlocks℠ series, Impact Assessment allows clients to determine if their portfolio is in alignment with their sustainability values, such as social responsibility, climate and more. Next Best Dollar allows advisors to engage with clients and their children, to determine how they can best allocate their income and maximize every paycheck.

Sustainable Investment View: Envestnet continues to advance its sustainable technology roadmap, including direct-indexing solutions and tax overlay services. The Sustainable Investment View is the latest enhancement and can be accessed through the next generation of the Proposal tool, allowing advisors to personalize portfolios for investors focused on sustainability with the click of a button—by leveraging the research, data and analytics, and technology infrastructure across Envestnet's ecosystem. Sustainable Investment View creates a frictionless workflow for integrating an investor's sustainability preferences within proposed investment strategies.

Next-Generation Trading: Combining the best elements of the portfolio management platforms at Envestnet, including from FolioDynamix and Envestnet | Tamarac, to deliver best-in-class portfolio management and trading solutions that enable advisors' practices through efficiency and scalability. New features include a personalized and configurable dashboard to initiate actions, a portfolio explorer, trade generation, order review and order management. Clients benefit from integrations with custodial partners and an integrated wealth platform experience with proposal generation, reporting, research, and billing.

For more information and to digitally engage with the Envestnet Advisor Summit please follow https://twitter.com/ENVintel, and the hashtag #ENVSummit.

About Envestnet

Envestnet refers to the family of operating subsidiaries of the public holding company, Envestnet, Inc. (NYSE: ENV). Envestnet is Fully Vested™ in empowering advisors and financial service providers with innovative technology, solutions, and intelligence to help make financial wellness a reality for their clients through an intelligently connected financial life. Approximately 107,000 advisors and more than 6,500 companies—including 16 of the 20 largest U.S. banks, 47 of the 50 largest wealth management and brokerage firms, over 500 of the largest RIAs, and hundreds of FinTech companies—leverage Envestnet technology and services that help drive better outcomes for enterprises, advisors, and their clients.

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

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