ENVESTNET
Asset Management

The Envestnet Asset Management Platform for Fee-Based Advisory Services

Envestnet Asset Management provides an end-to-end web-based platform for all the fee-based asset management account needs. It offers a complete solution for advisory service businesses. The Envestnet platform supports debt, equity, and balanced Separate Account Management, Wrap Mutual Fund Portfolios, Fee Based Broker Programs, Envestnet Model Portfolios and Standard & Poor's Model Mutual Fund Portfolios.

Envestnet Asset Management access only requires a single log-in. The web-based system allows the advisor to automate their entire business and do it all -- marketing and client acquisition, portfolio monitoring, client statements, rebalancing and performance reporting. This end-to-end solution integrates the most advanced investment products and services to help the advisor grow and manage their practice.

Automate the Pre-Sale Process

- Create client risk profiles using a risk-tolerance questionnaire
- Integrate asset allocation and portfolio optimization tools
- Analyze client's current portfolio holdings
- Generate tailored documents, such as proposals, on demand

Enhance Client Servicing

- Create customized, sophisticated investment plans quickly
- Financial planning tools and integrated portfolio construction capabilities
- Provide consolidated and up-to-date portfolio information any time, any place

Gain a Competitive Edge

- Access top institutional-level financial product and services that level the playing field
- In-depth asset manager research reports
- Comprehensive asset manager due diligence process
- Separate Account Management and mutual funds on an integrated platform

Professional Development for Advisors

- Web-based instruction
- Online multimedia modules
- User manuals on platform

Key benefits for Financial Advisors and Money Managers

Increase Productivity and Enhance Client Services:

- Platform fully automates the fee-based business, allowing advisors to move away from administrative duties to building their advisory business faster.
- Fully customizable, private-labeled, and advisor-branded portfolio reports
- Tailored investment plans position the advisor as a professional consultant that provides value-added services.

For more information log on to www.envestnet.com