



EnterprisePortal

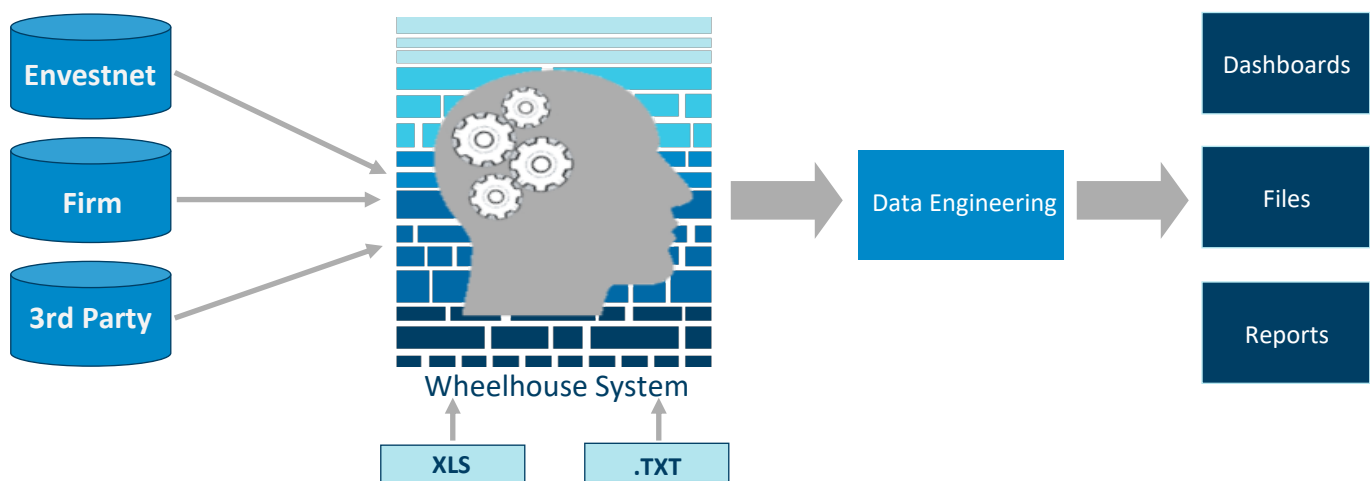
Custom Dashboards

We realize you have additional data that fills in the complete picture of your business. You may also have custom territories, specialized reporting needs, and unique ideas for our analytics.

Our analytics system is OPEN!

We can take additional data in any format to give you the most complete set of analytics available. Marrying this data with the data from Envestnet will create a custom set of analytics to help you make great business decisions.

Let us do the heavy lifting; you drive success!



Examples of Additional Data:

- Non-Envestnet AUM and Transaction Data
- Firm Hierarchy, including Teams and Split Rep Codes
- Custom Product Names
- Revenue/Expense Data

Key Users:

- Senior Executives
- Finance
- Compliance
- Sales
- Manager Relations



EnterprisePortal

Further Information

This document is designed for Advisor/Investment Professional Use Only. The information, analysis, and opinions expressed herein are for general and educational purposes only. Nothing contained in this document is intended to constitute legal, regulatory, tax, accounting, securities, or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type. All investments carry a certain risk, and there is no assurance that an investment will provide positive performance over any period of time. Investment decisions should always be made based on the investor's specific financial needs and objectives, goals, time horizon and risk tolerance. The statements herein are based upon the opinions of Envestnet and third party sources. Information obtained from third party resources are believed to be reliable but not guaranteed. All opinions and views constitute our judgments as of the date of writing and are subject to change at any time without notice. This document refers to information, products or services that, currently or in the future, may be developed, internally (or by receiving information from other parties in connection with such development activities or otherwise). Accordingly, nothing in this document should be construed as a representation or agreement by Envestnet to develop, or have developed for it, any information products or services (including, without limitation, concepts, systems or techniques).

ADVISOR/INVESTMENT PROFESSIONAL USE ONLY AND IS NOT FOR PUBLIC DISTRIBUTION

© 2017 Envestnet, Inc. All Rights Reserved