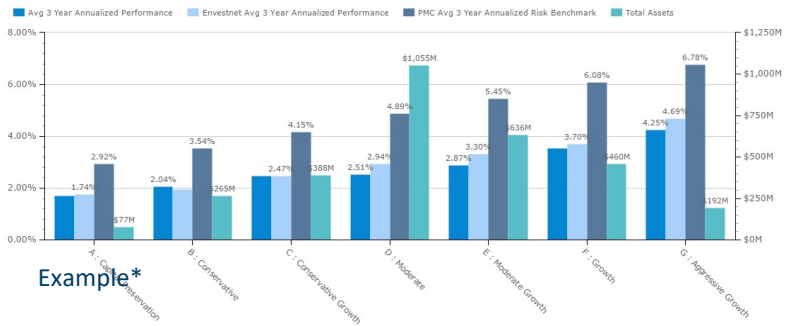




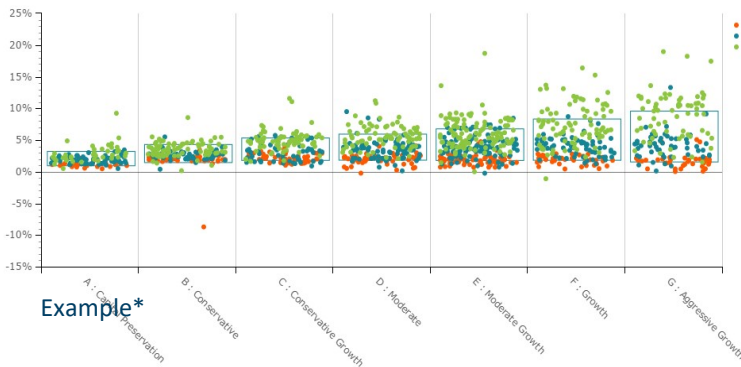
# EnterprisePortal

## Performance Dashboards

Using our team of data engineers, scientists, and analysts, we work with the vast amount of data in the Envestnet platform to provide our partners with robust analytics. We do all the heavy lifting to turn production data into an analytical database which you can then access through our cutting-edge dashboard system, Envestnet Analytics. Industry veterans and vast business knowledge has allowed us to design impactful, out-of-the-box insights. Our goal is to help you grow your assets, make great business decisions, and manage your partners like never before.



Our Performance Dashboards provide an intuitive way to measure your advisor’s account level performance. You’ll be able to quickly find the accounts that are performing at an acceptable level, and, more importantly, the accounts that aren’t working.



We make it possible to see performance at the enterprise, firm, advisor, and down to the individual account level.

In addition to understanding performance at all levels of your firm, we provide benchmarks compared to several different peer groups.

### What Can You Do?

- Directly compare the performance of different programs and strategies
- Better manage and coach your advisors
- Understand your performance compared to peers

### Key Users

- Senior Executives
- Product Managers
- Compliance
- Sales

\*For illustrative purposes. Does not represent actual performance data.



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