

ManagerSolutions

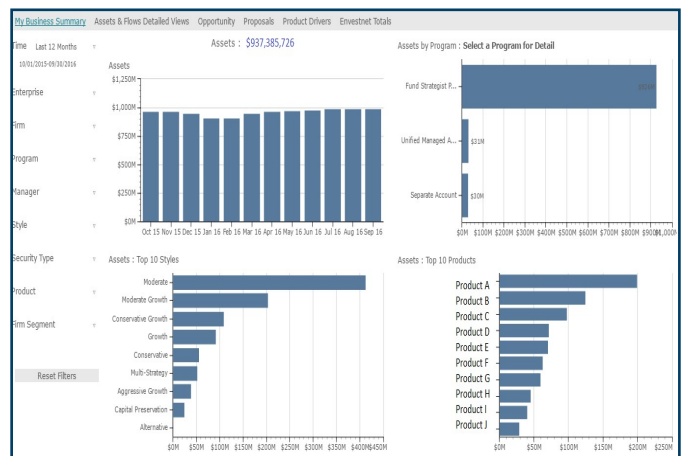
Basic Dashboards

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, which is available online anywhere on any device. Our goal is to help you grow your assets, make great business decisions, and manage your partners like never before.

Envestnet Analytics provides you with the answers you need to optimize your business within the Envestnet universe of over 500 financial advisory firms, with \$1 trillion in assets and administration. The most successful managers are using Envestnet Analytics as their “Virtual Account Manager” and are analyzing their assets, flows, and proposals more efficiently to know which firms and products to focus on, stay ahead of their competition, and stay aware of your best advisors’ trends. With Envestnet Analytics, you will get unprecedented insight into where your opportunities lie, and who you need to meet with to secure them.

What Can You Do?

- Measure Your Success at Envestnet and Firms
- Track and Respond to Advisor Momentum
- Find Your Best Asset Gathering Opportunities
- See Critical Sales Trends
 - Firms and Advisors
 - Programs
 - Products
 - Geography
- Socialized Product Availability
- See Your Pipeline in Proposals
- Upload, store, and share your marketing content with firms on the platform



Key Users

- Executives
- Heads of Distribution
- Territory / National Managers
- Product Managers


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Further Information

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