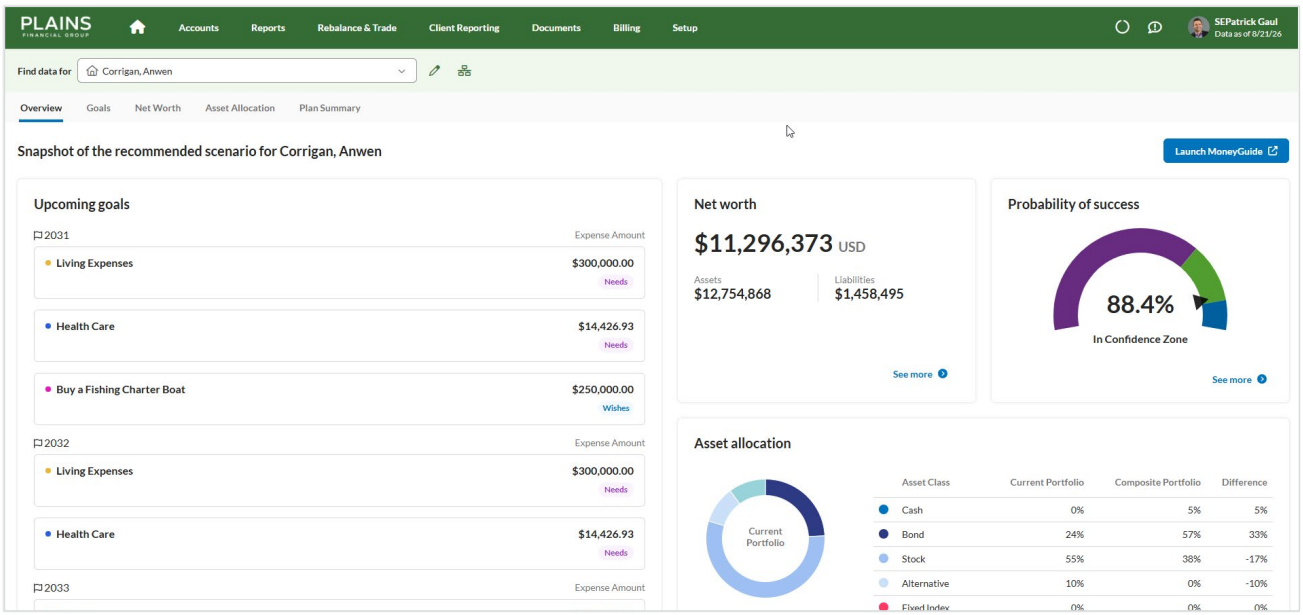
ENVESTNET

MoneyGuide + Tamarac

Bringing planning and wealth management together

Financial planning is most effective when advisors can access plan insights in the same place they manage client relationships and portfolios.

The enhanced integration between **Envestnet MoneyGuide** and **Envestnet Tamarac** helps advisors reduce application switching, access planning information more easily, and deliver a more connected client experience by bringing key financial planning insights directly into Tamarac workflows and the client portal.



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Key benefits

Planning insights embedded in Tamarac

Access key financial planning information directly within Tamarac through new MoneyGuide dashboards. Advisors can review critical plan details as part of their existing workflow, reducing clicks, saving time, and helping them prepare more effectively for client conversations.

Unified planning data in the client record

Dedicated MoneyGuide planning dashboards within the Tamarac advisor portal that provides a consolidated view of:

- Net worth
- Asset allocation
- Financial plan summaries
- Plan goals

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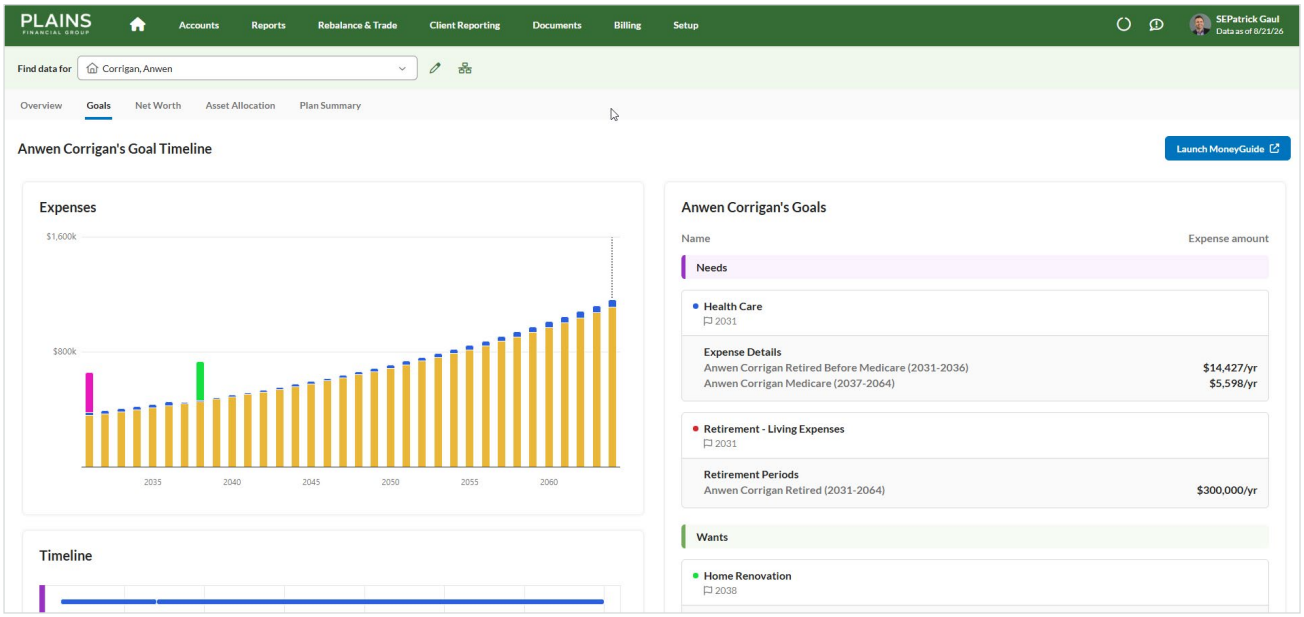

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With both high-level and detailed planning insights available in one place, advisors can move seamlessly between financial planning and wealth management activities.

Richer net worth visibility

Enhanced ownership can provide provide a clearer picture of how assets and liabilities are structured, helping advisors deliver more informed planning guidance.

Clients can view net worth information:

- In Estate
- Out of Estate
- By Individual Owner

These perspectives are designed to greater transparency into ownership structures and support more meaningful planning conversations.

The outcome

By bringing financial planning insights directly into Tamarac and extending MoneyGuide data throughout the advisor and client experience, firms can:

- Reduce context switching between applications
- Improve advisor productivity
- Access planning information faster
- Create more informed client conversations
- Deliver a more connected planning and wealth management experience

One workflow.
One client experience.
More meaningful advice.

Extend planning value into a connected investment platform built to scale.
Learn more.

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