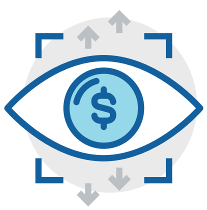
Envestnet Insights Engine

Activate Data and Analytics for Impact

The Envestnet Wealth Data Platform uncovers next-best actions that address client pain points, save advisors time, and help generate firm revenue. See what our data, analytics, and experiences driven platform — featuring Insights Engine — can do for you.



75M unique insights across 12 categories[1]

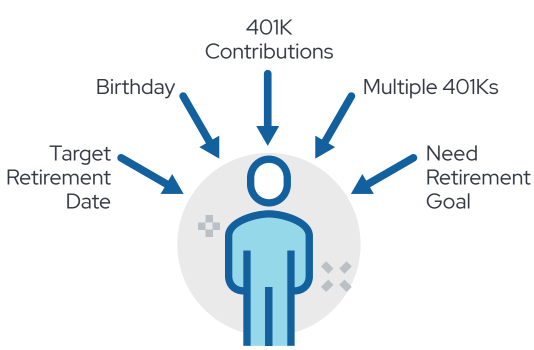
200+ firms [1]

~105K advisors [1]

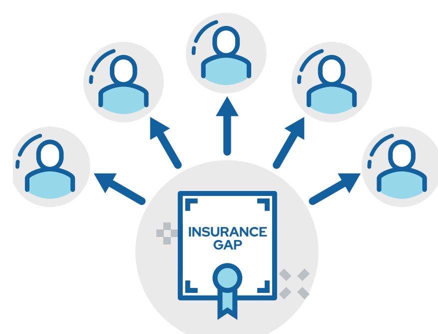
Here are four of the the top insight categories

Financial Planning

Achieve better outcomes for clients, advisors, and firms with data driven financial planning that enables efficient action on individual client and firm-wide insights.



Advisors can quickly generate holistic views of a client's financial life to strengthen client relationships and proactively guide strategy.



Firms can target a specific insight and execute personalized outreach at scale for client financial health and to offer related services.

Wealth

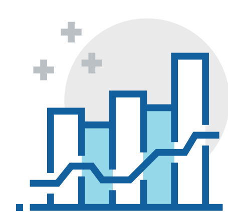
Improve client service and advisor productivity with wealth insights that uncover opportunities that once brought under firm oversight can be monitored and optimized.

Money Flows

- No Client Contribution in 12 months
- IRA Contributions
- Significant Client Inflow

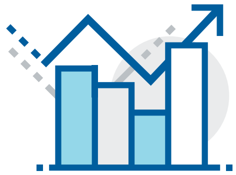
Account Performance

- Managed Account at a Loss
- Underperforming Products
- High Cash

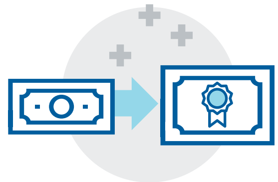


Non-managed Wealth

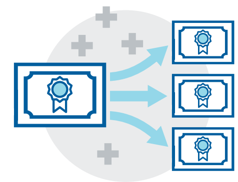
Initiate vital conversations to support your clients' best interests and evaluate some of the top revenue driving, non managed wealth opportunities for advisors and firms.



Non-managed Account at a Loss: One of the highest number of insights surfaced, advisors can discuss alternatives with clients and potentially expand firm managed accounts.



Non-managed Cash Concentration: Identify clients over allocated in cash and recommend alternatives for potentially better outcomes for clients, advisors, and firms.



Non-managed Single Stock Concentration: Surface portfolios with a large single stock concentration, and discuss goal alignment with clients to see if there opportunities to reduce portfolio risk.

Taxes

A survey conducted by Envestnet found that 75% of advisors faced more tax questions in 2021 than ever before.[3] Equip advisors with easy to use analytics such as Tax Loss Harvesting and Tax Overlay to manage their clients accounts more productively and help their clients capture losses and offset gains at tax time.[4]

For more information on the Envestnet Wealth Data Platform, please visit envestnet.com.

[1] Envestnet Insights Engine data from 04/01/2020 to 10/01/2022 reflecting both Envestnet Wealth and RIA customers generating 75M insights representing ~105K unique advisors.

[2] Calculations based on Envestnet Insights Engine data from 04/01/2020 to 09/01/2022 reflecting both Envestnet Wealth and RIA customers.

[3] Envestnet Market Intelligence Advisor Survey, Winter 2021.

[4] Neither Envestnet, Envestnet | PMC™ nor its representatives render tax, accounting or legal advice. Any tax statements contained herein are not intended or written to be used, and cannot be used, for the purpose of avoiding U.S. federal, state, or local tax penalties. Taxpayers should always seek advice based on their own particular circumstances from an independent tax advisor.

Client must carefully determine if the use of tax overlay services is appropriate for their circumstances, risk tolerance, and investment objectives. Tax management services are limited in scope and are not designed to permanently eliminate taxes in the account.