

ENVESTNET ENHANCES SUSTAINABILITY PLATFORM™ TO INCORPORATE SRI OVERLAY SCREENS TO TRADITIONAL SMA'S

The integrated platform enables advisors to deliver portfolios that align their clients' investment goals with their specific personal convictions

CHICAGO, December 1, 2008

Envestnet today announced new enhancements to its Sustainability Platform™ that will enable advisors to customize traditional SMA and UMA investment proposals with SRI overlay screens that meet the personal convictions of their clients.

"One in every nine dollars under portfolio management in the U.S. is now slated towards sustainable and socially responsible investing¹," says Michael Lent, Chief Investment Officer at Veris Wealth Partners, the sustainability partner to Envestnet. "We've seen tremendous growth in sustainable assets over the last few years, and the Envestnet Sustainability Platform™ is responding to that growth by integrating a level of customization that takes into consideration a client's desire to incorporate ESG [environmental, social and governance] factors to the traditional equity products that they invest in."

The new screens – known as *SRI Personal Conviction Screens* – are comprised of 17 different screens categorized into 2 levels of criteria: *SRI Best-in-Class* and *SRI Strict*. Both screens are a best efforts attempt to exclude companies who derive significant levels of revenue from or have poor standing in the following areas: Alcohol, Animal Welfare, Customer Rights, Employee Rights, Environment, Firearms, Gambling, Human Rights, Military Weapons, Nuclear Power, Tobacco, Abortion, Adult Entertainment, Contraceptives, Embryonic Stem Cell/Fetal Tissue, Usury and Landmines.

"We've added another level of customization to our investment services," said Bill Crager, President of Envestnet. "Our new enhancement enables investors to customize portfolios in a way that matches their investment objectives with broader environmental, and cultural perspectives."

¹ Social Investment Forum, 2007 Report on Socially Responsible Investing Trends in the United States

Combining investment intelligence with social awareness, the Envestnet Sustainability Platform™ is a comprehensive suite of resources that includes access to: sustainable integrated managers and strategists that incorporate the fundamentals of sustainable investing into their investment philosophy; SRI Personal Conviction Screens that can be applied to a broad universe of separately managed accounts, mutual funds, and ETFs; a Sustainable Unified Managed Account; and proxy voting on important SRI-related decisions.

The Envestnet Sustainability Platform™ was developed in conjunction with Envestnet and two important alliances – one with Veris Wealth Partners, instrumental in creating the program design and portfolio solutions, and another with KLD Research & Analytics (KLD), the gold standard for sustainable investment research, who provide the analytics, research and screening to the equity managers involved in the offering.

ABOUT ENVESTNET ASSET MANAGEMENT

Envestnet is an advisor's gateway for expert wealth advisory solutions. Through a unified technology platform, the company offers a broad range of investment products as well as fee-based services and solutions that include extensive reporting capabilities and front-, middle-, and back-office administrative tools to the independent financial advisor.

Envestnet delivers unparalleled practice and portfolio management support, empowering advisors to create customized investment solutions that are able to meet their clients' unique investment needs. We leverage the expertise of premier asset managers and defined asset allocation strategies as well as offer financial advisors ongoing investment manager research and portfolio monitoring provided by PMC, the investment consultancy arm of Envestnet.

Our proprietary technology platform is geared towards reducing administrative demands as well as providing tools and resources to help advisors spend more time focusing on important client relationships.

Envestnet is headquartered in Chicago with offices in Denver, Los Angeles,



New York, Silicon Valley and Trivandrum, India. The firm has \$81 billion in total assets served and more than 650,000 investor accounts.*

** Data includes assets under management and administration as of 9/30/2008*

ABOUT VERIS WEALTH PARTNERS

Veris Wealth Partners is the sustainability investment partner to Envestnet, providing program design and portfolio solutions for the Envestnet Sustainability Platform™. Veris Wealth Partners is an independent registered investment advisor focused on values, wealth and sustainability.

ABOUT KLD RESEARCH & ANALYTICS, INC.

Founded in 1988, KLD Research & Analytics, Inc. is an independent investment research firm providing institutional investors with authoritative social and sustainability investment research and compliance services, consulting services, and benchmark and strategy indexes. For more information about KLD, please visit www.kld.com.

CONTACTS:

Todd Miller
Envestnet Asset Management
203-378-1152, ext. 149

www.envestnet.com