



## **Envestnet expands its selection of wealth advisory solutions and enhances its advisor support capabilities**

### ***Newest offering accommodates growing demand for portfolio expertise and investment options focused on sustainability***

CHICAGO (MARCH 3, 2008) –Envestnet, a leading provider of wealth advisory solutions to more than 10,000 financial advisors, has launched a comprehensive communications effort to inform the financial community of the expanding base of features and benefits derived from its comprehensive Web-based platform ([www.envestnet.com](http://www.envestnet.com)).

Designed to provide independent financial advisors with convenient access to an array of functionality, information resources, and investment solutions, Envestnet has fine-tuned its offerings in the areas of client account management, productivity enhancement, and asset management for client portfolios.

“Our core philosophies haven’t changed, but we have improved the way we deliver our services to the financial professional,” said Bill Crager, President of Envestnet Asset Management. “We have improved the technology interface that advisors use to access our platform, and we have expanded the programs that serve and inform our user base.”

An important component of the updated Envestnet platform is a refreshed marketing initiative that involves an expanded product set, a new look and feel for the firm’s marketing materials, enhanced content for advisor-based sales support tools, and a new Web site ([investnetadvisor.com](http://investnetadvisor.com)) that is dedicated to serving the advisor community.

Citing one example of this new initiative, Envestnet announces the availability of its latest enhancement, the *Envestnet Sustainability Platform*.<sup>TM</sup> This offering integrates three major components to systematically incorporate the tenets of sustainability into the process of constructing client portfolios. And to assist in these efforts, Envestnet has developed two important alliances – one with Veris Wealth Partners, instrumental in creating the program design and portfolio solutions, and one 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.

This approach enables individuals to more easily align their investment decisions with their personal beliefs on important environmental, social, and governance issues.

“We believe this is a key step toward our goal of expanding the resources that connect investors with a wider range of options and help them act on their convictions,” said Crager.

Crager further explains: "We're not just throwing random products at advisors; we always seek to integrate client account management, productivity enhancement, and asset management for client portfolios into one adaptable platform. Our newest offering is one that we believe will answer the growing concern over the impact of various economic activities on our environment and our society."

Through the Sustainability Platform, advisors will have access to a Sustainable Unified Managed Account (UMA), a selection of sustainable portfolios by leading investment managers and strategists, and a two-tiered SRI overlay screening to traditional equity managers.

#### **About Envestnet Asset Management**

Envestnet Asset Management, one of the largest providers of wealth management solutions in the industry, delivers separately managed accounts, mutual funds, mutual fund wrap portfolios, multi-managed accounts, ETFs, fixed income solutions, sustainability solutions and alternative investments to independent financial advisors. Envestnet's investment offerings are supported by a proprietary technology platform that delivers customized advisor web sites, consolidated views and comprehensive reporting abilities to the nation's independent investment advisory firms. Envestnet is headquartered in Chicago with offices in Denver, Los Angeles, New York, Silicon Valley and Trivandrum, India.

Envestnet has more than \$45 billion in assets under management and administration with over 440,000 investor accounts.\*

*\*Data as of 12/31/2007*

#### **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](http://www.kld.com).

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