Equip Your Advisors With The Tools To Navigate Market Volatility

We're all keeping a close eye on the markets, and your advisors are likely spending a significant amount of time reassuring clients and helping them understand and stick to their financial plans. Access to tools to help navigate today's uncertainty and to reinforce client relationships is critical for both you and your advisors. In times like these, we see many of our clients leaning on our broader suite of solutions to deliver a more robust client experience and create efficiencies in their businesses.

A Suite of Solutions to Address Market Volatility

These solutions can be used in combination to help you better address client concerns, enhance your relationships, and streamline your operations during market volatility. Our bundled suite of solutions includes:

- ✓ The Envestnet Platform +
- ✓ MoneyGuide & MyBlocks +
- ✓ Envestnet Data & Analytics +
- ✓ BlackRock's Advisor Center

Optimize the Envestnet Platform with the Power of MoneyGuide

We believe financial planning is the gateway to financial wellness, and today's market underscores the need for grounding clients in comprehensive, living-and-breathing financial plans. We recommend enhancing the Envestnet platform with the power of our MoneyGuide financial planning software. Through MoneyGuide, your advisors can utilize financial planning to motivate each client to create, implement, and maintain an investment strategy that meets their lifetime goals:

- Interactively demonstrate for clients – both remotely and in real time – the effects that possible changes to their portfolios could have over the long term.
- Help prevent clients from making decisions they may regret when conditions normalize by harnessing the power of modern financial planning strategies.
- Deepen client engagement and promote productive financial conversations focused on client needs through MyBlocks.

Use MyBlocks to create a meaningful and personal experience for your clients that promotes productive conversations and showcases your value.

Augment Your Existing Technology with Aggregation, Analytics, and Portfolio Risk Tools

Financial planning is one of the most powerful resources in your tool kit, but not the only one. Envestnet offers a suite of complementary solutions that can help you optimize your business, as well as that of your advisors – particularly in challenging markets.

Data Aggregation: Account aggregation can be one of the easiest and fastest ways for your advisors to enhance the way they serve existing clients and demonstrate value for prospects. Having access to a client's entire financial picture fuels the financial plan, and enables your advisors to use that knowledge to deliver comprehensive financial advice.

Having an Aggregated View of Your Clients' Financial Picture Can Help Illustrate Their True Cash Allocation

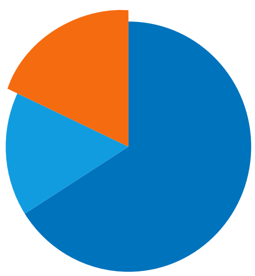
During volatile times, being able to show clients their entire net worth – including their home equity, bank accounts, and cash portion of their investment accounts – can be eye-opening. Clients may be less inclined to flee to cash when they see how large their cash allocation truly is.

Cash Percentage in Investment Accounts

66% Stocks and stock mutual funds

16% Bonds and bond mutual funds

18% Cash



Cash Percentage Across Entire Financial Picture

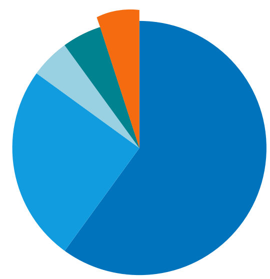
60% Home equity

25% Investment portfolio

5% Automobiles

5% Bank accounts

5% Cash



Hypothetical example, for illustration only.

Analytics: During periods of market volatility, keeping a close eye on portfolio and practice trends can give you a significant advantage. Through the **Envestnet Analytics' Enterprise and Advisor Portals**, you and your advisors can benchmark your key business drivers to find out how you're faring compared to your peers and industry leaders.

Leverage data and analytics for insight into your business, your clients, and your competition.

Portfolio Risk Tools: Through our integration with **BlackRock's Advisor Center**, your advisors can access sophisticated, yet simple-to-use tools that make it easy for them to understand portfolio risk and confidently communicate that to clients. **360° Evaluator** allows advisors to analyze portfolios from many angles – performance, risk, cost, and more – with insights tailored to each portfolio. **Scenario Tester** allows advisors to stress-test portfolios against more than 30 market scenarios to understand how they might react. Together with clients, advisors can uncover key scenarios we've already experienced, understand the impact, and help better prepare for what's next.

These tools can help during periods of volatility – during the downturn and the recovery – which is critical to helping clients understand their financial plan, make decisions aligned to their long-term goals, and stay invested.

Address market "what-ifs" head on with Scenario Tester by uncovering how portfolios may react during both the downturn and the recovery.

Partner to Partner: We Are Here to Support You

We are ready to help you integrate our broader suite of offerings and translate them into essential advice to create a client-facing experience that builds a deeper connection with clients. To learn more and gain access to our packaged pricing options, please contact your Envestnet Relationship Manager.

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