

February 19, 2020



Investnet | PMC Launches Strategist UMAs, a Suite of Multi-Asset Class Portfolios from Six Top Asset Managers

PMC Partners with BlackRock, Clark Capital, Legg Mason, PIMCO, and Russell Investments to Offer Selection of Managed Accounts Integrated and Customized with Investnet's Leading Tax and Impact Overlays

CHICAGO, Feb. 19, 2020 /PRNewswire/ -- Investnet | PMC today announced the launch of a Strategist UMA program, a suite of unified managed accounts for advisors working with high-net-worth (HNW) and ultra-high-net-worth (UHNW) clients. These portfolios bring together offerings from six top asset managers on the Investnet platform. The suite can be easily implemented into an advisor's business and will offer end investors a diverse range of portfolios for various risk tolerances wrapped in PMC's exclusive portfolio-overlay technology for incorporating tax management and impact investing preferences.



"Investnet's vision is to provide advisors a full range of wealth management solutions integrated within a unified advice platform," said **Jim Patrick, Group President, Investnet | PMC**. "We are committed to making these solutions as simple to access as possible, through products such as Strategist UMAs, to empower advisors to help their clients achieve their goals."

This portfolio suite brings together two wealth management solutions that have seen tremendous growth in recent years. The amount of assets in Fund Strategist Portfolios (FSPs) on the Investnet platform grew from \$26 billion in Q3 2014 to \$77 billion as of Q3 2019, while unified managed accounts (UMAs) grew from \$28 billion to \$80 billion in the past 5 years.

PMC partnered with leading asset managers BlackRock, Clark Capital, Legg Mason, PIMCO, and Russell Investments, while leveraging their own manager and market research, to produce 86 multi-asset class portfolios that combine individual stocks, individual bonds, mutual funds and ETFs and can easily be combined to incorporate PMC's industry leading digital tax and impact overlay services. Additionally, the Digital Portfolio Consultant within the Investnet platform will ask an advisor a series of questions to help them find a Strategist

UMA portfolio that fits their client's needs.

"These portfolios give advisors servicing HNW and UHNW clients access to globally diversified, risk tolerance specific solutions from top asset managers inside our UMA chassis," said **Michael Featherman, Managing Director, Investnet | PMC**. "What takes this offering to the next level is that each portfolio is designed for easy implementation of PMC's patented tax and impact overlay technologies on separate account equity sleeves while also including individual fixed income securities in the portfolio. We are enabling the advisor to automate the delivery of tax alpha and easily implement value-focused investing strategies."

About Investnet

Investnet, Inc. (NYSE: ENV) is a leading provider of intelligent systems for wealth management and financial wellness. Investnet's unified technology empowers enterprises and advisors to more fully understand their clients and deliver actionable intelligence that drives better outcomes and improves lives.

Investnet Wealth Solutions enables enterprises and advisors to better manage client outcomes and strengthen their practices through its leading Wealth Management Operating System and advanced portfolio solutions. Investnet | Tamarac provides portfolio management, reporting, trading, rebalancing and client portal solutions for registered investment advisers ("RIAs"). Investnet | MoneyGuide provides goals-based financial planning applications. Investnet Data & Analytics enables innovation and insights through its Investnet | Yodlee data aggregation platform.

More than 100,000 advisors and more than 4,700 companies including: 16 of the 20 largest U.S. banks, 43 of the 50 largest wealth management and brokerage firms, over 500 of the largest RIAs and hundreds of internet services companies, leverage Investnet technology and services. Investnet solutions enhance knowledge of the client, accelerate client onboarding, improve client digital experiences and help drive better outcomes for enterprises, advisors and their clients.

For more information about Investnet | PMC, please visit investpmc.com. and follow us on Twitter at [@ENVintel](https://twitter.com/ENVintel).

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