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# Investnet Offers Complimentary Access to MyBlocks™ Planning Tool by MoneyGuide

## Helping More Americans Plan for the Future and Work Toward Financial Wellness During Time of Crisis

CHICAGO, April 8, 2020 /PRNewswire/ -- The world has changed due to the COVID-19 outbreak, and the pandemic has had a dramatic impact on Americans' financial lives. Investnet, Inc. (NYSE: ENV) today announced a special free offer of its MyBlocks™ financial planning tool, by Investnet | MoneyGuide, to give consumers access to planning solutions that they can explore on their own through a financial advisor.

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Advisors within the financial services community can make MyBlocks available for free to clients and prospects for the next 90 days. Investnet will also provide employees of its enterprise and RIA customers with free access to MyBlocks during this period. MyBlocks is a leading digital client engagement tool that breaks down key financial wellness topics, such as retirement planning and protecting your family, into bite-size modules, known as "blocks." These interactive modules allow clients to explore their financial lives on their own and discover answers to questions they may have. Advisors can then utilize this information to begin financial planning conversations.

"While we cannot manufacture masks or ventilators, we want to do our part to help as many

Americans as possible during this time of crisis," said **Bill Crager, CEO of Investnet**. "We are providing the broader advisor community with free access to our MyBlocks planning tool to help more people across the country navigate through this turbulent time."

Investnet is also providing complimentary 90-day access to Investnet | Yodlee data aggregation to enable the availability of Investnet | Yodlee FinApps within MyBlocks. Clients can construct a full picture of assets, liabilities, and other financial information—and have the ability to track finances to evaluate and forecast future expenses and income, measure their financial health, and answer questions such as, "Is it okay to spend?"

All Americans can self-register for MyBlocks through a link provided by their advisors—and utilize MyBlocks to obtain a pulse-check on how they are doing financially, identify how long their money will last, protect their families, help enable a path to achieve financial freedom, and much more.

"The fear of the unknown is most stressful," said **Tony Leal, President of Investnet | MoneyGuide**. "Having a plan, regardless of how detailed, can help relieve the stress caused by these tough financial times."

Non-MoneyGuide subscribers interested in requesting a complimentary trial of MyBlocks can visit <https://www.moneyguidepro.com/static/MyBlocks-Financial-Wellness.htm>. As part of the trial, advisors can benefit from Investnet | MoneyGuide's award-winning advisor support and onboarding resources. For every financial plan created from MyBlocks during the offer period, Investnet will donate \$1 (up to \$25,000) to Feeding America.

"April is National Financial Literacy Month, and as parents are home with their families, we hope they'll take this opportunity to have a conversation about finances with our nation's future investors, as they can benefit greatly from these digital tools to learn about risk, how to best apply money toward credit card debt and student loans, and how to build an emergency account," added **Mr. Leal**.

### **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 on Envestnet, please visit [www.envestnet.com](http://www.envestnet.com) and follow us on Twitter [@ENVintel](https://twitter.com/ENVintel). For more information on Envestnet | MoneyGuide, please visit [www.moneyguidepro.com](http://www.moneyguidepro.com) and follow us on Twitter at [@ENVMoneyGuide](https://twitter.com/ENVMoneyGuide).

### Media Contact

Dana Taormina  
JConnelly for Envestnet  
973.647.4626  
[envestnetpr@jconnelly.com](mailto:envestnetpr@jconnelly.com)



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