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Investnet Offers Retirement Analytics to Enterprise Home Offices, Bolstering Intelligence-Driven Business Insights

Analytics Engine Empowers Broker-Dealers to Make Well-Informed, Strategic Decisions About Their Retirement Books of Business, Based on Actionable 401(k) Data from Investnet Retirement Solutions

CHICAGO, Sept. 9, 2020 /PRNewswire/ -- Investnet, Inc. (NYSE: ENV) has rolled out the Investnet Retirement Analytics solution for enterprise home offices, providing them with a business intelligence tool for obtaining a clear picture of their books of business for employer-sponsored retirement plans—and helping their clients to achieve better outcomes.



Investnet Retirement Analytics, a component of the Investnet Analytics suite, applies an overlay to the data which Investnet Retirement Solutions (ERS) collects directly from 401(k) recordkeepers, fund companies, custodians, and other sources. These insights give home offices a comprehensive overview of 401(k) plan trends and assets at the macro level, as well as at the individual plan, recordkeeper, and fund family levels—enabling home offices to identify investment and growth opportunities for clients, strengthen partnerships, and proactively monitor performance and risk.

Home offices can print recordkeeper, fund family, and advisor scorecards from Investnet Retirement Analytics which show estimated growth over time based on 401(k) data analysis.

"The combination of aggregated 401(k) data from Investnet Retirement Solutions and the intuitive business intelligence of Investnet Analytics is a game-changer for home offices working with 401(k) plan sponsors," said **Khash Sarrafi, Senior Vice President of Institutional Sales at Investnet Retirement Solutions**. "We are providing key performance indicators on a hosted solution built by industry veterans, which enables advisors to properly leverage insights and technology for making well-informed decisions on their retirement books of business."

Investnet Retirement Analytics findings can be:

- Curated based on team member roles, in order to call attention to what users most need to see.
- Sent to home offices in reports which are customizable and easy to socialize.
- Directly emailed to users when their most important data changes.

"By adding data-driven retirement plan insights alongside the intelligence in various other areas on the Envestnet Analytics dashboard, we are addressing a key dimension of financial wellness for enterprise home offices," said **Todd Buck, Managing Director and Head of Analytics Sales at Envestnet**. "This enhancement is the next step in our ongoing commitment to providing advisors with the technology, data analytics, and business intelligence they need to grow their practices, deliver better client outcomes, and help clients achieve financial wellness."

More information about Envestnet Retirement Analytics will be shared during a webinar on September 16, 2020 at 3 pm ET. To register, please visit <https://event.on24.com/wcc/r/2613516/62EB4AFA3F430EBD853E57EB9FA04042>.

About Envestnet

Envestnet, Inc. (NYSE: ENV) is transforming the way financial advice and wellness are delivered. Our mission is to empower advisors and financial service providers with innovative technology, solutions, and intelligence to make financial wellness a reality for everyone. Over 103,000 advisors across more than 4,900 companies including 16 of the 20 largest U.S. banks, 46 of the 50 largest wealth management and brokerage firms, over 500 of the largest RIAs, and hundreds of FinTech companies, leverage the Envestnet platform to grow their businesses and client relationships.

For more information on Envestnet Retirement Solutions, please visit www.envestnetrs.com.

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