

September 29, 2020



Dana D'Auria, CFA, Joins Investnet as Co-CIO

Industry Veteran Will Play Key Role in Ongoing Diversification and Coordination of Research, Overlay, and Portfolio Management--and Fortification of Fiduciary Solutions

CHICAGO, Sept. 29, 2020 /PRNewswire/ -- Investnet, Inc. (NYSE: ENV) announces that Dana D'Auria has joined the organization as Co-Chief Investment Officer of Investnet. In her new role, she will join Investnet | PMC's Investment Committee, and utilize her expertise to further grow and align PMC's fiduciary solutions and other resources, including overlay services, research and portfolio management.



"I have had the privilege of working in close partnership with Investnet over the past 14 years, and I am proud to officially join its investment management arm after witnessing firsthand how much its distribution and research services support growth for the firm as well as asset managers, advisors, and investors," said **Dana D'Auria, who will join as Co-Chief Investment Officer of Investnet**. "I believe that solid research is the foundation for exceptional investment solutions for clients, and Investnet shares this approach."

Ms. D'Auria most recently served as Managing Director of Symmetry Partners, where she has worked for the last 14 years and also served as President and Portfolio Manager of Symmetry Panoramic Mutual Funds, the firm's multi-factor family of funds. At Symmetry Partners, Ms. D'Auria led the investments/research, mutual fund, and investment communications departments, and helped develop new investment strategies to meet the needs of clients. She has been honored by *Money Management Executive* as one of the publication's "Top Women in Asset Management" in 2018 and "Women to Watch" in 2017. She has also published articles on factor investing in *The Journal of Financial Planning* and *The Journal of Index Investing*.

"As we continue to grow during an ever-changing regulatory environment, this is the ideal time to invest in great talent like Dana," said **Brandon Thomas, Co-Founder and Chief Investment Officer of Investnet**. "Her experience providing evidence-based asset management to broker dealers, independent advisors and clients and her interest in unifying

data analytics with wealth management will help us position ourselves to deliver best-in-class investment solutions as our industry continues to evolve."

Ms. D'Auria holds the Chartered Financial Analyst (CFA) designation and earned both her MBA (in finance) and BA (in English and international studies) from Fairfield University.

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.

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