

March 25, 2021



BOK Financial Advisor Trust Services Now Available as Embedded Offering via Investnet Trust Services Exchange

Integration Strengthens Soon-to-Launch Platform Powered by Trucentent, Delivering One-Stop Marketplace for Enabling RIAs & Broker-Dealers to Seamlessly Create, Manage & Transfer Trust Accounts for Clients

CHICAGO, March 25, 2021 /PRNewswire/ -- Investnet, Inc. (NYSE: ENV) announces that **BOK Financial (NASDAQ: BOKF) has joined the** Investnet Trust Services Exchange, powered by Trucentent, in a partnership aimed at providing financial advisors and their clients with access to a nationally chartered, advisor-friendly trust company with a broad array of services.



The Investnet Trust Services Exchange was created through partnership with [Trucentent](#), a provider of tools and solutions for enabling advisors to strengthen their understanding and use of trusts in estate planning. BOK Financial Advisor Trust Services is now available on Investnet's Trust Services Exchange, fulfilling a critical role in the wealth transfer process.

"Naming a friend or family member as a trustee may seem like a simple solution, but it may not always be the best solution. Most individuals lack the expertise and experience needed to serve as trustee," said **John Yackel, Executive Managing Director and Head of Strategic Initiatives at Investnet**. "Given the extent of the responsibilities involved and the potential liability in the event of an error, selecting a professional trustee may be a better alternative. Another key benefit of this integrated platform is that it offers advisors with clients, who may be unhappy with their current corporate trustee, the flexibility to potentially move those relationships to this offering and to take advantage of an integrated and improved client experience, while capturing new assets."

The Investnet Trust Services Exchange is the only advisor-centric offering that supports the entire wealth transfer process. This solution integrates goal-setting, advice creation, documentation, account implementation, and trustee services while leveraging a powerful

third-party estate planning attorney network.

"Investnet and BOK Financial are aligned in the mission to empower advisors to better serve their clients through trust administration solutions," said **Rosemary Hueser, Senior Vice President, Manager of BOK Financial Advisor Trust Services**. "Our trust administration solutions can help enhance, strengthen, and grow advisors' relationships with clients, as well as their practices by capturing and retaining trust assets. This partnership allows us to meet and work with today's most forward-looking advisors on the platforms that they are comfortable with, and inside of their natural planning processes."

The Investnet Trust Services Exchange will be fully integrated with Investnet | MoneyGuide, Investnet | Tamarac, and other offerings within the Investnet ecosystem. This will enable advisors to integrate this new capability for managing trust accounts into the platforms and workflows that drive their practices today.

About Investnet

Investnet, 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 106,000 advisors across more than 5,100 companies—including 17 of the 20 largest U.S. banks, 47 of the 50 largest wealth management and brokerage firms, over 500 of the largest RIAs, and hundreds of Fintech companies—leverage the Investnet platform to grow their businesses and client relationships.

For more information on Investnet, please visit www.investnet.com, subscribe to our [blog](#), and follow us on Twitter ([@ENVintel](#)) and [LinkedIn](#).

For more information on Trucentent, please visit www.trucentent.com.

About BOK Financial Corporation

BOK Financial Corporation is a \$47 billion regional financial services company headquartered in Tulsa, Oklahoma with \$92 billion in assets under management and administration. The company's stock is publicly traded on NASDAQ under the Global Select market listings (BOKF). BOK Financial Corporation's holdings include BOKF, NA; BOK Financial Securities, Inc., BOK Financial Private Wealth, Inc. and BOK Financial Insurance, Inc. BOKF, NA operates TransFund, Cavanal Hill Investment Management and BOK Financial Asset Management, Inc. BOKF, NA operates banking divisions across eight states as: Bank of Albuquerque; Bank of Oklahoma; Bank of Texas; and BOK Financial in Arizona, Arkansas, Colorado, Kansas and Missouri; as well as having limited purpose offices in Nebraska, Milwaukee and Connecticut. Through its subsidiaries, BOK Financial Corporation provides commercial and consumer banking, brokerage trading, investment, trust and insurance services, mortgage origination and servicing, and an electronic funds transfer network. For more information, visit www.bokf.com.

This release refers to information products or services that may be in development and not yet available. Accordingly, nothing in this release should be construed as a representation or legal agreement by Investnet to make available specific products or services (including, without limitation, concepts, systems or techniques). BOK Financial and Investnet are

separate and unaffiliated firms. This release should not be construed as a recommendation or endorsement of any particular product, service, or firm.

Media Contact:

Dana Taormina
JConnelly for Envestnet
973.647.4626
envestnetpr@jconnelly.com

📄 View original content to download multimedia <http://www.prnewswire.com/news-releases/bok-financial-advisor-trust-services-now-available-as-embedded-offering-via-envestnet-trust-services-exchange-301255732.html>

SOURCE Envestnet, Inc.