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Investnet's Omnichannel Brand Campaign Delivers on Vision of Creating an Intelligent Financial Life™ for All

Firm's Financial Wellness Ecosystem Continues to Disrupt WealthTech, Raising Awareness By Connecting Human & Digital Experiences

CHICAGO, Dec. 21, 2021 /PRNewswire/ --Investnet's "Fully Vested" omnichannel brand campaign kicked off in September 2021, delivering on its mission to empower financial advisors and professionals with its always-on financial wellness ecosystem to deliver The Intelligent Financial Life™ for their clients.



The campaign, developed in partnership with the Boston-based creative advertising and production agency HeyLet'sGo, anchors around cross-generation stories designed to show the complexity of an individual's financial life, and how advisors and technology can help. These journeys, connecting the digital and human components of the Intelligent Financial Life, are shared through a variety of innovative and creative media.

"What started with an industry changing idea has grown into a transformational component of the Investnet business and brand going forward," said **Mary Ellen Dugan, Chief Marketing Officer of Investnet**. "To elevate the message that we are Fully Vested in

empowering financial advisors to deliver an Intelligent Financial Life, we have embarked upon an omnichannel marketing campaign unlike anything Envestnet has done before. We are ready and eager to help members of the financial community bring the many different aspects of consumers' finances together, so they have dynamic, 360-degree views of their clients' finances today—and a clearer direction on where they're headed tomorrow."

The Intelligent Financial Life is a hyper-personalized, intelligently connected, and frictionless digital experience that links every aspect of a consumer's financial life. It enables consumers to understand the connections between seemingly mundane daily purchases, like shopping for groceries or paying mobile phone bills, and longer-term goals, such as managing a mortgage or buying a second home. For more information, please visit <https://www.envestnet.com/intelligent-financial-life>.

"The digital user experience is important for engaging and serving clients. But it's not enough," said **Bill Crager, Co-Founder and CEO of Envestnet** "In order to truly improve outcomes across what they spend today and save tomorrow, clients also need to be able to receive expertise and guidance from a human advisor when, where, and how they want it. This is what the Envestnet ecosystem does by creating the intelligently connected financial life—which we believe is the future of our industry."

The brand campaign spans across online video, out-of-home (OOH) advertising, radio, and connected TV. In just 90 days, Envestnet saw interest far exceeding expectations, with website traffic increasing significantly—and engagement to "learn more" by clicking through to the Envestnet ecosystem tripling. While unique visitors have also increased, what's impressive is that returning users continue to accelerate across the Envestnet digital landscape. These early results show that this is a conversation that the wealth management and financial advisor community need to have.

Ms. Dugan added, "It has been incredible to see what has resonated the most with our target audiences, and that even during a pandemic, individuals still crave the information needed to help them make sense of their often complex finances. This campaign has really brought to life the sentiment that the wealth management industry truly needs to help connect these dots for consumers, making our advisors the hero for their clients."

In order to reach the campaign's target audience—key decision-makers in the financial services industry—Envestnet partnered with the innovative New York-based digital media and marketing expert, Goodway Group, to implement strategic placements which drive awareness and engagement. OOH advertising placements were tested during COVID-19 in New York City's Financial District in buildings and outside to get a pulse on who was absorbing the campaign.

About Envestnet

Envestnet refers to the family of operating subsidiaries of the public holding company, Envestnet, Inc. (NYSE: ENV). Envestnet 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. Nearly 108,000 advisors and more than 6,000 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 Envestnet technology

and services that help drive better outcomes for enterprises, advisors, and their clients.

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

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