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# Investnet Data and Analytics to Enter the Small to Medium-Sized Business Market

BERWYN, Pa., April 18, 2022 /PRNewswire/ -- Investnet today announced plans to expand into the small to medium-sized business (SMB) market by introducing data and digital solutions that empower SMBs to intelligently connect, grow, protect, and manage the financial wellness of their business all in one place. The solution will be offered by Investnet to its clients – including advisors, banks and FinTechs – to help their SMB customers better run their businesses by integrating data from across all the applications they use.



This growth is part of Investnet Data and Analytics' overall mission to drive financial wellness with data, artificial intelligence and an exceptional user experience, while also optimizing and broadening Investnet's wealth capabilities and platform for advisors – all of which help bring the Intelligent Financial Life™ to a new market.

"Entering the SMB space will bring data-powered solutions to a wide range of business owners who have seen their financial needs and goals change drastically over the last two years," said Farouk Ferchichi, Global Head of Investnet Data and Analytics. "Introducing new solutions to the SMB market by actively working with our advisor, bank and FinTech partners will not only deepen Investnet's data and technology capabilities in the market, but will allow this SMB segment to gain insights and intelligence on their business' finances."

As part of Investnet's commitment to serving SMB customers, it has recently partnered with upSWOT, a platform connected to 150+ SaaS products used by SMBs. By signing a multi-year agreement with an innovative SMB market player whose technology will help power Investnet's SMB solution, Investnet is committed to becoming a leader in the sector.

## About Investnet

Investnet refers to the family of operating subsidiaries of the public holding company, Investnet, Inc. (NYSE: ENV). Investnet is Fully Vested™ in empowering advisors and financial service providers with innovative technology, solutions, and intelligence to help make financial wellness a reality for their clients through an intelligently connected financial life. Over 108,000 advisors and more than 6,000 companies—including 18 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 on Envestnet, please visit [www.envestnet.com](http://www.envestnet.com) and follow us on Twitter @ENVintel.

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