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# Envestnet & Cetera Renew Agreement to Empower Financial Professionals to Deliver Holistic, Personalized Advice for Investors

## Cetera® Enhances Financial Planning & Portfolio Management Capabilities for Financial Professionals--Bringing Full Array of Digitized Solutions Aimed to Drive Efficiency & Enable Professionals to Serve More Clients

CHICAGO, Feb. 12, 2021 /PRNewswire/ -- Envestnet, Inc. (NYSE: ENV) has renewed its agreement with [Cetera®](#), providing Cetera's network of over 8,000 independent financial professionals with the full range of technology, data, and solutions available on Envestnet's unified advice platform. The Envestnet financial wellness network encompasses financial planning and budgeting, investing, managing credit, and protecting capital, powered by data intelligence, and its flagship wealth management platform to facilitate the selection, delivery, and management of advisory investment solutions. The firms are teaming up to empower financial professionals with tools and digital solutions aimed to drive efficiency, while offering holistic financial planning tools to help more Americans reach their long-term financial goals.



"Our growing financial wellness network brings together the elements required for financial professionals and enterprises to expand the definition of advice they can provide," said **Bill Crager, Co-Founder and CEO of Envestnet**. "We are proud to be able to team up with enterprise organizations like Cetera to help deliver scale and a full array of financial wellness solutions to its network."

With this agreement, Cetera financial professionals and institutions will continue to have access to the entire suite of Envestnet | MoneyGuide integrated financial planning tools. Additionally, Cetera has integrated individual blocks from MyBlocks™ enabling clients and prospects to engage on demand throughout AdviceWorks®, the firm's financial professional and client portal, and MoneyGuideElite<sup>SM</sup>, including distribution planning to help clients navigate distribution options during retirement.

"We have been fortunate to work with the development teams at Cetera to help them deliver a world-class platform," said **Tony Leal, President of Investnet | MoneyGuide** "We are glad that our innovative financial planning tools are able to complement Cetera's client and advisor experience."

Cetera will continue to leverage and build upon technology in Investnet's wealth management chassis as the underlying technology for its award-winning\* My Advice Architect<sup>®</sup> advisory platform. The platform was voted by its network as one of the most impactful support resources to their business in a recent internal survey conducted by the firm.

"Advice is the central component of the financial professional/client relationship, and Investnet's financial wellness network expands the depth and breadth of the advice our independent financial professionals can offer," said **Adam Antoniadis, CEO of Cetera**. "Cetera will continue to expand upon the tools and technology that enable its network to grow more, and achieve more, while delivering an Advice Centric Experience on behalf of the clients they serve."

*\*My Advice Architect<sup>®</sup> was recognized with the technology innovation award at the 2018 and 2019 Bank Insurance & Securities Association (BISA) Annual Convention.*

## **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 105,000 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](http://www.investnet.com), subscribe to our [blog](#), and follow us on Twitter ([@ENVintel](#)) and [LinkedIn](#).

## **About Cetera Financial Group<sup>®</sup>**

Cetera Financial Group (Cetera) is a leading financial advice firm. It empowers the delivery of an Advice-Centric Experience<sup>®</sup> to individuals, families and businesses across the country through independent financial advisors as well as trusted tax professionals and banks and credit unions. It's headquartered at 200 N. Pacific Coast Highway, Suite 1200, El Segundo, CA 90245-5670.

Comprehensive services include: wealth management solutions, retirement plan solutions, advisory services, practice management support, innovative technology, marketing guidance, regulatory support, and market research.

"Cetera Financial Group" refers to the network of independent retail firms encompassing, among others, Cetera Advisors LLC, Cetera Advisor Networks LLC, Cetera Investment Services LLC (marketed as Cetera Financial Institutions or Cetera Investors), Cetera Financial Specialists LLC, and First Allied Securities, Inc. All firms are members

FINRA/SIPC.

Individuals affiliated with Cetera firms are either Registered Representatives who offer only brokerage services and receive transaction-based compensation (commissions), Investment Adviser Representatives who offer only investment advisory services and receive fees based on assets, or both Registered Representatives and Investment Adviser Representatives, who can offer both types of services.

Cetera and Envestnet are separate and unaffiliated firms, and are not responsible for each other's services or policies. This release should not be construed as a recommendation or endorsement of any particular product, service, or firm.

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