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Investnet Partners with Door to Digitize & Optimize Exchange of Information in the Due Diligence Process

Door's Digital Platform Streamlines Information Management for Asset Managers & Research Analysts

BERWYN, Pa., April 20, 2022 /PRNewswire/ -- Investnet announces a partnership with Door, a leading global digital due diligence and risk management platform, to streamline and optimize its research on asset managers and their investment strategies across the Investnet ecosystem, and the industry.



Historically, research analysts have used the same common information from investment managers during the due diligence process, with information typically gathered using Microsoft Word and Excel documents exchanged over email. The lack of a centralized source of information and notifications has made it cumbersome to manage due diligence questionnaires in many varied formats, and identify and monitor critical metrics.

The partnership between Investnet and Door will help solve these inefficiencies by digitizing the due diligence experience, and enabling Investnet | PMC manager research teams to benefit from:

- **Digital Due Diligence Questionnaires, customized to meet Investnet's process** that simplify the management of due diligence requests by reducing redundant content preparation, speeding up response times, and improving risk controls.
- **Real-time updates on criteria such as investment risk, governance, sustainability, and diversity, equity, and inclusion**, which can help research teams better manage risk and analyze asset managers and strategies.
- **Door's content database**, which easily integrates with other research tools and makes it easy to edit documents and process and archive information.

"We consistently seek innovative technology partners that streamline more aspects of wealth management and financial planning," said **Dana D'Auria, Co-Chief Investment Officer of**

Envestnet. "By standardizing the majority of the information that asset managers and research analysts need to exchange during due diligence, Door can help us and our industry peers enable advisors and their end clients to make well-informed investment decisions—and facilitate stronger engagement between asset managers and the analysts, advisors, and investors who evaluate their strategies."

More than 400 manager research firms and asset managers from over 39 countries are represented on the Door platform.

"We are delighted that Envestnet is joining its global peers to help drive the long overdue digital transformation of due diligence," said **Roland Meerdter, CEO and Co-Founder of Door**. "Door's global scale and coverage provides a unique opportunity to asset managers, regardless of size, to access the due diligence teams of the most prominent local, regional, and global wealth managers."

About Envestnet

Envestnet refers to the family of operating subsidiaries of the public holding company, Envestnet, Inc. (NYSE: ENV). Envestnet 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, subscribe to our [blog](#), and follow us on Twitter ([@ENVintel](#)) and [LinkedIn](#).

For more information on Envestnet | PMC, please visit www.investpmc.com.

About Door

Door is the digital interface used by professional investors to access up-to-date information for fund research and operational due diligence. Door streamlines the information exchange, saving asset managers time, improving client experience and reducing investment risk. Door works with over 400 asset managers and manager research teams in 39 countries. For more information, please visit <https://guidetodoor.com/>.

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