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# Investnet's Spring Technology Releases Further Enhance Its Financial Wellness Ecosystem

*Latest Innovations Build on the Firm's Technology Roadmap To Support a Single View of a Client's Entire Financial Life*

BERWYN, Pa., April 28, 2022 /PRNewswire/ -- Investnet has launched a series of technology updates throughout its ecosystem, designed to meet and exceed the evolving technology and investing needs of financial advisors and their clients. These enhancements are a part of a series of spring releases that include investment products, web-based planning solutions, and an optimized advisor and client experience.



"As part of our always on, and always improving financial wellness ecosystem, these latest technology releases lead into our biggest event of the year, the [2022 Investnet Advisor Summit](#)," said **Molly Weiss, Head of Product for Investnet Wealth** "We're excited by these enhancements and look forward to unveiling additional innovations as part of our roadmap at Summit."

New features within Investnet's ecosystem, including the next-generation proposal workflow, are driven by feedback from advisors, who can now access the following capabilities within proposals for new investment products:

- **Fund Strategist Tax Management** allow advisors to outsource and automate tax management on either third-party manager or proprietary home office fund strategist portfolio accounts at scale and personalized to their individual clients' tax situations and investment goals.
- **Sustainable investing strategies and overlays** enable advisors to incorporate institutional-quality and customized sustainable investment approaches into client portfolios.
- **Private Wealth Consulting** to help advisors connect to Investnet's investment specialists, who can work with them to further customize solutions for their clients.
- **Enhanced account setup features**, such as more flexible dollar cost average settings and account-level security restrictions.

- **Updated performance reports** that can break out time periods and performance by asset class and manager.

"These investments in our ecosystem help ensure we continue to offer a truly forward-looking experience for advisors and their clients that allows them to plan ahead across generations," added **Ms. Weiss**. "Ongoing enhancements to Envestnet's fully connected wealth ecosystem give advisors even more power to help clients capture opportunities, make strategic decisions, and make progress toward their goals."

[Envestnet | Tamarac](#)'s updates slated for spring include:

- **Streamlined navigation for Unified Managed Accounts** in the Client Portal, and in the Reporting solution.
- **Compliance tools to support advisor's Form ADV and 13F** reporting
- **Enhanced reporting capabilities** to show position attribution, and annualized returns on position performance.
- Continued usability enhancements for the new modernized trading experience with **simplified Rebalancing workflow**, including a new interface, summary report, and trading dashboard widgets.

In addition, [Envestnet | MoneyGuide](#) has completed a new integration with **Special Needs Map**, a web-based planning tool to help estimate how much money a client may need to leave a child with special needs after they pass. The application guides the client through an intuitive interface asking questions about their family, their child's capabilities and long-term needs, and financial assumptions to arrive at a dollar amount, which is broken down in-depth among categories such as housing/care and lifestyle expenses. To learn more, visit <https://www.specialneedsmap.com/>.

"With the new Special Needs Map feature, advisors can help clients who have children with special needs navigate and plan accordingly for when they are no longer able to care for their loved ones themselves," said **Rose Palazzo, Group Head of Envestnet | MoneyGuide**.

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

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