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Envestnet & Investment Advisor Honor Asset Manager & Strategist Award Winners

Horizon Investments Named Manager of the Year at Awards Presentation during Envestnet Advisor Summit in New Orleans

CHICAGO, May 18, 2018 /PRNewswire/ -- Envestnet, Inc. (NYSE: ENV) and *Investment Advisor* magazine announced the winners of this year's Asset Manager and Strategist of the Year Awards this week at the Envestnet Advisor Summit, which took place at the Ernest N. Morial Convention Center in New Orleans (<http://www.envestnet.com/advisorsummit>).



The awards program, now in its 14th year, recognizes high-conviction portfolio managers that exemplify best practices for investment management success. Horizon Investments, which won in the Strategist category this year for its Goals Based Solutions offering, was chosen from among the winners by Envestnet and *Investment Advisor* as the overall Manager of the Year, an elite honor given to firms that embody investment management excellence. All winners will be featured in the July 2018 issue of *Investment Advisor*.

"Highlighting outstanding managers is an important service for members of the asset management community as well as the advisors and investors who rely on them," said **Tim Clift, Chief Investment Strategist at Envestnet | PMC**, Envestnet's Portfolio Management Consultants group. "Working together with *Investment Advisor*, we continue to shine a spotlight on asset managers whose best practices and outperformance set them apart—and encourage other managers to emulate their success."

The 2018 Envestnet and *Investment Advisor* Asset Manager and Strategist of the Year Award winners are:

U.S. Equity Large Cap

Dana Investment Advisors —Large Cap Core

Wakefield Asset Management —Large Cap Core

U.S. Equity Small or Mid Cap

Baird Funds—Mid Cap Growth
Kayne Anderson Rudnick—Small Cap Sustainable Growth

International or Global Equity

WCM Investment Management—Quality Global Growth

Fixed Income

GW&K Investment Management—Enhanced Core Bond

Impact

ClearBridge Investments—Large Cap Growth ESG Strategy

Strategist

Horizon Investments—Goal Based Solutions

The name of the awards, previously known as the Separately Managed Account (SMA) Manager and Strategist of the Year Awards, was changed this year to better reflect the scope of the asset management industry and allow for the inclusion of more categories. As in previous years, the award winners and finalists were selected using Investnet | PMC's multi-factor, proprietary, and systematic methodology for evaluating managers. This framework considers a broad spectrum of qualitative and quantitative criteria, including investment process and style, performance, firm profile, customer service, and tax efficiency.

To be eligible for an award, a management team must have at least three years of experience running a strategy that has \$200 million or more in assets. Managers must also report their products through Investnet | PMC's Premium Research solutions, which serve as leading sources of investment-manager due diligence and research for advisors.

"We join our partners at Investnet in congratulating the winners of this year's Asset Manager and Strategist of the Year Awards," said **Janet Levaux, Editor-in-Chief of *Investment Advisor***. "Sharing the award-winners stories in our magazine will give our readers helpful insight into what they should look for when assessing the many investment products and strategies available to their clients."

About Investnet

Investnet, Inc. (NYSE: ENV) is a leading provider of intelligent systems for wealth management and financial wellness. Investnet's unified technology enhances advisor productivity and strengthens the wealth management process. Investnet empowers enterprises and advisors to more fully understand their clients and deliver better outcomes.

Investnet enables financial advisors to better manage client outcomes and strengthen their practices. Institutional-quality research and advanced portfolio solutions are provided through Investnet | PMC, our Portfolio Management Consultants group. Investnet | Yodlee is a leading data aggregation and data analytics platform powering dynamic, cloud-based innovation for digital financial services. Investnet | Tamarac provides leading rebalancing, reporting, and practice management software for advisors. Investnet | Retirement Solutions provides an integrated platform that combines leading practice management technology, research, data aggregation and fiduciary managed account solutions.

More than 87,000 advisors and 3,000 companies including: 16 of the 20 largest U.S. banks,

43 of the 50 largest wealth management and brokerage firms, over 500 of the largest Registered Investment Advisers, and hundreds of Internet services companies, leverage Envestnet technology and services. Envestnet solutions enhance knowledge of the client, accelerate client on-boarding, improve client digital experiences and help drive better outcomes for enterprises, advisors and their clients.

For more information on Envestnet, please visit www.envestnet.com and follow [@ENVintel](https://twitter.com/ENVintel).

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