

March 2, 2020



Envestnet Unveils Preview of 2020 Advisor Summit in Austin

During the year of Envestnet's 20th anniversary, thousands of financial professionals will gather to network and learn insights from prominent keynotes and experts on how unified advice is changing wealth management

CHICAGO, March 2, 2020 /PRNewswire/ -- Envestnet, Inc. (NYSE: ENV) is expecting several thousand advisors and financial professionals from across the country to attend this year's Envestnet Advisor Summit, taking place April 29-30, 2020, at the Austin Convention Center in Austin, Texas. This year's Summit—which is quickly becoming one of the biggest annual conferences for financial advisors—coincides with Envestnet's 20th anniversary. More information, including registration details, is available at <https://www.envestnet.com/advisorsummit>.

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"Envestnet is all about being a champion for independent advice. As the Advisor Summit continues to grow year over year, we have become one of the largest annual gatherings for advisors and members of the financial services and technology industry that support them," said **Bill Crager, Interim CEO of Envestnet**. "In a time of great change and evolution, the Advisor Summit is a crucial resource for advisors to come together and learn how to stay ahead of the curve—both from experts and from each other. Twenty years after our establishment, Envestnet is a leader in allowing advisors to expand their advice offering in

order to help their clients achieve financial wellness—and I can think of no better way to mark this milestone than by hosting our largest-ever Advisor Summit."

Featured Speakers

This year's Summit will include presentations from members of the Envestnet management team, such as Mr. Crager and **Stuart DePina, Chief Executive of Envestnet Data & Analytics**. In addition, attendees will have the chance to glean insights from keynote speakers recognized for their outstanding achievements:

- **David Brooks, *New York Times* Columnist and Bestselling Author**, renowned for his keen commentary on present-day politics and foreign affairs.
- **Brené Brown, Research Professor at the University of Houston**, who has spent the past two decades studying courage and leadership.
- **Dr. Daniel Crosby, Chief Behavioral Officer of Brinker Capital**, a behavioral finance expert and psychologist who helps financial services organizations understand how the mind and markets come together.

Personalized Conference Experience

Summit participants can choose to attend a variety of practice management sessions, product roadmap presentations, advisor panels, and advanced technology training. To help attendees choose the activities which offer them the most value, Envestnet has organized curated session tracks designed for specific audiences, including independent registered investment advisors (RIAs), broker-dealer representatives, home offices, and bank wealth management advisors.

To view the different tailored agendas, participants can visit the "My Summit" section of the Envestnet Advisor Summit website

(<https://www.envestnet.com/advisorsummit/agenda/full/>).

Pre-Conference Options

Summit attendees can arrive early for pre-Summit technology training sessions that combine learning with networking:

- **Tamarac User Groups:** Participants can learn from their peers in similar-sized firms how they receive optimal benefits from the Envestnet | Tamarac solution, and overcome common challenges.
- **Beginner's Guide to MoneyGuide:** Attendees can join a hands-on, interactive lab where Envestnet | MoneyGuide experts will coach them through case studies to help them gain a deeper understanding of how to effectively utilize the financial planning solution for their clients.

In addition, the Summit agenda includes:

- In-depth presentations focusing on how advisors can harness:
 - **Envestnet Insurance Exchange** and **Envestnet Credit Exchange** to provide clients with insurance and lending products as part of a holistic wealth management experience.
 - The **MyBlocks™** offering from **Envestnet | MoneyGuide** to start the financial

planning conversation with clients, and foster greater collaboration to set key financial wellness goals.

- The **Investnet Advisor Analytics** platform to access data-driven, actionable insights for helping them better manage and monitor client investment performance and goals.
- **Boot Camp or Goat Yoga?** Attendees interested in boosting their *physical wellness* are invited to take part in multiple outdoor exercise activities, including a yoga class in the company of friendly baby goats!
- **Award & Grant Presentations:** Investnet will announce the winners of the annual Essential Advisor™ Awards and Asset Manager Awards on April 29 at 6 p.m. Following the award presentations, Investnet will recognize this year's recipients of grants from the Investnet Invest in Others Grants for Good Program, created in partnership with the Invest in Others Charitable Foundation (<https://www.investinothers.org/envestnetgrant/>).
- **Final Night Party:** Finally, Investnet will cap off the end of the conference at the renowned Austin City Limits Moody Theater with a concert by the indie rock band Spoon.

Mobile App & Social Media

The Advisor Summit mobile app offers attendees an easy way to build a custom agenda to meet their learning objectives at the conference, and enables them to interact during sessions with live polling. The app also promotes networking and enables participants to connect with each other through instant messaging.

Attendees can keep up-to-date on conference events by following the Investnet Advisor Summit (<https://twitter.com/ENVSummit>) on Twitter, and share their experiences at the conference using the **#ENVSummit** hashtag.

About Investnet

Investnet, Inc. (NYSE: ENV) is a leading provider of intelligent systems for wealth management and financial wellness. Investnet's unified technology empowers enterprises and advisors to more fully understand their clients and deliver actionable intelligence that drives better outcomes and improves lives.

Investnet Wealth Solutions enables enterprises and advisors to better manage client outcomes and strengthen their practices through its leading Wealth Management Operating System and advanced portfolio solutions. Investnet | Tamarac provides portfolio management, reporting, trading, rebalancing and client portal solutions for registered investment advisers ("RIAs"). Investnet | MoneyGuide provides goals-based financial planning applications. Investnet Data & Analytics enables innovation and insights through its Investnet | Yodlee data aggregation platform.

More than 100,000 advisors and more than 4,700 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 RIAs and hundreds of internet services companies, leverage Investnet technology


and services. Envestnet solutions enhance knowledge of the client, accelerate client onboarding, 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 us on Twitter at [@ENVintel](https://twitter.com/ENVintel).

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ENVESTNET ADVISOR SUMMIT

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