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# 'Investnet Connect' Creates Deeper Digital Advisor/Client Relationships Through Partnership with AdvisorStream & Apprise Labs

*Centralized Application Produces Data-Driven, Relevant Information Based on Clients' Specific Needs*

CHICAGO, May 26, 2020 /PRNewswire/ -- Investnet, Inc. (NYSE: ENV) unveils Investnet Connect, an artificial intelligence (AI)-driven application that integrates the client's household financial data with relevant and personalized news content aligned with their values and financial journey progress. Investnet has partnered with AdvisorStream and Apprise Labs to build Investnet Connect, creating a centralized personal application designed to help clients achieve financial wellness through deeper connections with their advisors.



"Investnet Connect embodies what we believe is the future of financial advice — a unified view of a client's financial health with data driven personalized content that drives advisor/client engagement," said **Bill Crager, CEO of Investnet**. "At a time when investors are seeking stronger connections with their advisors, we are harnessing data science to bring together financial planning, performance reporting and relevant news into one view for clients. This hyper-personalized wealth management experience significantly enhances collaboration and communication between advisors and clients, giving, them the data-driven intelligence necessary to achieve financial wellness."

The Investnet Advisor Summit On-Demand will include a video demo of Investnet Connect. To receive a notification when Summit On-Demand content goes live, sign up at <https://www.investnet.com/advisorsummit/>.

"The present crisis underscores the necessity of an intuitive, customized digital interface for engaging with clients anywhere at any time, and proactively offering relevant information and recommendations," said **Edmond Walters, CEO and Co-Founder of Apprise Labs**. "Investnet Connect makes digital engagement more human, fostering stronger connections that empower advisors to deliver more holistic and valuable financial advice."

Launching in the second half of this year, Envestnet Connect can serve as a digital touchpoint for advisors to use with their clients. The application was designed to be accessed by clients through a mobile device at any time, and from any location. In addition:

- Envestnet's strategic relationship with Apprise Labs creates an application programming interface (API)-driven client experience that consolidates data from multiple sources and brings solutions from across the Envestnet platform into a single customized view.
- Envestnet's partnership with AdvisorStream enables Envestnet Connect to include a diverse array of curated multimedia news content from respected, credible sources that is personalized to the goals of a specific household—and presented without advertisements, paywalls, or pop-ups.
- In addition to current and relevant news, podcasts, and videos, clients will be able to view up-to-date Envestnet performance reports, as well as financial plans from Envestnet | MoneyGuide and Apprise Labs, within Envestnet Connect.
- Features such as a Financial Calendar and To Do List are designed to keep clients informed and in consistent communication with their advisors.

"Envestnet's vision has been instrumental in innovating the industry for more than 20 years, and our partnership will further help advisors move clients closer to achieving financial wellness," said **Kevin Mulhern, CEO and Co-Founder of AdvisorStream**. "Leveraging AdvisorStream's advanced content marketing platform, Envestnet Connect will for the first time enable advisors to intelligently deliver personalized content that matches the financial interests, life events, and lifestyles of their clients. Envestnet Connect raises the client portal bar to heights the industry has not seen before. As a key component of Envestnet Connect, AdvisorStream is positioned to lead the way to more meaningful advisor/client communications today and in the future."

### **About Envestnet**

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

**Envestnet 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. **Envestnet | Tamarac** provides portfolio management, reporting, trading, rebalancing and client portal solutions for registered independent advisers ("RIAs"). **Envestnet | MoneyGuide** provides goals-based financial planning applications. **Envestnet Data & Analytics** enables innovation and insights through its **Envestnet | Yodlee** data aggregation platform.

More than 103,000 advisors and more than 4,900 companies including: 16 of the 20 largest U.S. banks, 46 of the 50 largest wealth management and brokerage firms, over 500 of the largest RIAs and hundreds of internet services companies, leverage Envestnet 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](http://www.envestnet.com), subscribe to our [blog](#),

and follow us on Twitter ([@ENVintel](#)) and [LinkedIn](#).

### **About AdvisorStream**

AdvisorStream is the only marketing platform fully partnered with the world's most credible and trusted publishers. The award-winning service helps financial advisors engage their clients and win prospects through timely, personalized and compliant investor communications. An omni-channel marketing service, AdvisorStream delivers the highest-quality and up-to-date article, commentary, video and infographic content through newsletters, social media, emails, websites, and client portals. Every year, AdvisorStream delivers hundreds of millions of communications materials on behalf of its vast network of financial advisors. Headed by CEO, co-founder and industry thought leader Kevin Mulhern, AdvisorStream has offices in New York, London, and Toronto. For more information, visit [AdvisorStream.com](#) or connect with us on social media on [Facebook](#), [LinkedIn](#), [Twitter](#), or [Instagram](#).

### **About Apprise Labs**

Apprise Labs is a newly founded startup located in the suburbs of Philadelphia, PA. Our goal is to provide innovative and collaborative presentation tools for financial advisors to use alongside their clients. Apprise Labs' software addresses estate planning, lifetime cash flow, and client retirement needs.

For more information on Apprise Labs, please visit [www.appriselabs.com](#) and connect with us on Twitter ([@appriselabs](#)) and [LinkedIn](#).

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