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# ENVESTNET AND FNZ PARTNER TO LAUNCH SEAMLESS, END-TO-END DIGITAL SOLUTION IN THE U.S. ALSO TO INTEGRATE AND DISTRIBUTE ENVESTNET'S WEALTH DATA PLATFORM INTERNATIONALLY

*Front-To-Back Digital Automation Integrates Envestnet Portal & Analytics with FNZ's Modern, Tech-Centric Platform To Better Serve Advisors and Clients*

BERWYN, Pa., Oct. 27, 2022 /PRNewswire/ -- Envestnet, Inc. (NYSE: ENV), a leading provider of intelligent systems for wealth management and financial wellness, today announced that it is partnering with FNZ, a leading global wealth platform, to create a fully digital, integrated wealth management experience for the U.S. market. The integration of Envestnet's and FNZ's platform will allow for real-time account opening and funding along with digitally automated servicing and maintenance capabilities for the full lifecycle of the client account.



Also, the partnership will enable unique insights and experiences generated by Envestnet Data & Analytics' Wealth Data Platform (WDP) to be integrated as part of FNZ's platform and distributed to FNZ's global customer base. Leveraging FNZ's international scale and data sets, Envestnet's WDP will help enterprises, advisors, and asset managers more effectively run their businesses with advanced predictive models.

"At Envestnet, we are focused on enabling financial institutions, enterprises, advisors and their clients to make well informed financial decisions. This exciting partnership will advance that mission and enhances our ability to empower advisors to deliver deeper insights to clients. We look forward to working closely with FNZ to provide scaled, streamlined, deeply connected experiences that will deliver greater intelligence and value for all our clients," said **Bill Crager, Co-Founder and CEO of Envestnet**

"We are very excited about our partnership with Envestnet. Both of our companies have a shared vision to open up wealth, helping everyone invest in their future on their terms," said **Adrian Durham, CEO of FNZ**. "The integrated solution will help our partners accelerate innovation and create outstanding client experiences."

## **FNZ**

FNZ's state-of-the-art platform provides end-to-end wealth management solutions to advisors and investment managers to rapidly deliver personalized services and innovative wealth products to their end clients. FNZ administers more than \$1.5 trillion in client assets representing over 20 million investors worldwide. It partners with over 650 large financial institutions and 8,000 wealth management firms in 21 countries, including aabrnn, Barclays, Colonial First State, Generali, Lloyds Bank, Santander and Vanguard.

## **Availability**

Envestnet's WDP will be integrated as part of FNZ's global platform and distributed in international markets beginning in the first quarter of 2023. The end-to-end, digital wealth management experience will be available in the United States during the second half of 2023.

"Today's announcement is another milestone in Envestnet's partnership strategy to accelerate our pace of innovation in the market," said **Rich Aneser, Chief Strategy Officer at Envestnet**. "By partnering with FNZ, a leading global wealth technology platform provider with cutting-edge technology, we continue to demonstrate that our open ecosystem creates improved experiences and more value for customers."

Envestnet has a market and industry-leading footprint spanning three businesses: Data and Analytics featuring its Wealth Data Platform, Wealth Tech comprising the advisor portal and financial planning solutions, and Wealth Solutions offering extensive managed accounts and personalization capabilities as well as holistic financial solutions including insurance, credit, and trust. As of June 30, 2022, the platform powers approximately \$5 trillion in total assets.

"We are delighted to be able to work closely with the experienced team at Envestnet as we continue to expand our U.S. footprint," said **Tom Chard, CEO, North America at FNZ**. "Integrating our capabilities, solutions and expertise will help us better serve advisors and clients in the United States, as well as globally."

## **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. More than 105,000 advisors and over 6,500 companies—including 16 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, please visit [www.envestnet.com](http://www.envestnet.com), subscribe to our blog, and follow us

on Twitter (@ENVintel) and LinkedIn.

## **About FNZ**


FNZ is the global platform provider in the wealth management sector, partnering with over 650 of the world's leading financial institutions and over 8,000 wealth management firms.

With over 4,500 employees in 21 countries, FNZ's mission is to open-up wealth, helping everyone, everywhere to invest in their future on their terms.

FNZ combines technology, infrastructure, and investment operations in a single state-of-the-art platform that frees its partners to create hyper-personalized and innovative products and services, that are seamlessly aligned with the needs of their clients.

To date, FNZ administers more than \$1.5 trillion in client assets and has enabled over 20 million people, from all wealth segments, to invest in an effective, simple, and transparent way, making wealth management accessible to everyone.

For more information, please visit [www.FNZ.com](http://www.FNZ.com) and follow us on LinkedIn (@FNZ Group).

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