



For Immediate Release

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Investnet Strengthens Integration with National Advisors, Delivering Unified Wealth Management Platform to Banks & RIAs

RIAs Given Easier Access to National Advisors for Trustee Services, while Community Banks can Harness Investnet Offerings to Obtain Greater Scale & Efficiency for Wealth Management Businesses

CHICAGO—October 18, 2016—Investnet, Inc. (NYSE: ENV) has deepened its integration and relationship with National Advisors’ family of companies—including National Advisors Trust Company, FSB; National Advisors Trust of South Dakota, Inc.; National Advisors Concierge Services; and National Advisors Holdings, Inc.—making it possible for banks, independent trust companies, and RIAs alike to benefit from a unified wealth management offering.

“Every technology update we make to our fully integrated platform is designed to empower wealth managers to become ‘essential advisors’ who can deliver better outcomes for their clients,” said **John Yackel, Executive Managing Director and Head of Institutional Business Development at Investnet**. “Furthermore, RIAs and broker-dealers planning to offer trust services can harness our unified offering to seamlessly and efficiently manage all aspects of their business divisions through a single solution. There has been a rapid convergence of advisory, brokerage, and trust services in this industry, and this partnership and integration offer a unique business solution combining best-in-breed investments and custody services as part of a unified approach to wealth management.”

Banks have traditionally operated their broker-dealer and bank trust businesses in different legal silos. This has led to an inconsistent experience for advisors and investors, and prevented banks from consistently delivering advice across their institutions. Investnet’s technology advancements and acquisitions over the past several years have created a unified platform whereby banks can now provide a seamless experience for clients across their broker-dealer, advisory, and trust divisions.

Investnet’s flexible and agnostic framework includes the capability to easily integrate with multiple trust accounting systems, custody, and trading platforms. Investnet’s enhanced integration with National Advisors builds on this progress, providing a single end-to-end wealth management platform for banks, independent trust companies, and RIAs that handles oversight, compliance support, and trading tasks as well as portfolio management and financial planning.

“Our integration with National Advisors delivers a high-value strategic solution for banks and advisors,” continued **Mr. Yackel**. “The combination of National Advisors’ nationwide reach, multi-jurisdictional trust powers, and objective, private label corporate-directed trustee model with our technology, and the inherent efficiencies and economies of the integration, can help solve many challenges and open the door for enhanced operational excellence.”

Bank wealth management organizations that advise clients, manage portfolios, oversee client relationships, coordinate trust services, or develop new businesses can all leverage the combined platform’s solutions, including:

- Integrated financial planning



- Data aggregation
- Envestnet's Investor Suite, which delivers access to Envestnet | Yodlee's financial wellness solutions
- Portfolio management and overlay trading tools
- Investment policy rules and compliance oversight
- Client reporting and performance measurement
- Custodian-agnostic integrations
- Branded administrative trust services in a corporate-directed trustee model

“Working together with Envestnet creates a powerful solution for banks and RIAs,” said **Jim Combs, President and CEO of National Advisors Holdings, Inc. and its affiliates**. “With Envestnet’s high-performance wealth management platform integrated with our independent, nationwide trust services and solutions—and the combined offering delivered in a corporate-directed trustee model—our two organizations greatly complement each other.”

As part of the deeper integration, advisors that rely on National Advisors will be able to access trust services through Envestnet’s platform. The combination of seamless, unified access to Envestnet for investment decisions with National Advisors’ trust services and investment processing solutions will enable wealth management businesses to provide a consistent experience for clients. In addition, Envestnet’s ability to integrate with multiple custody and trading platforms allows RIAs to leverage Envestnet to obtain trustee services for their clients through National Advisors.

“Offering trust services that provide even a modest financial return can be challenging for community banks and independent trust companies,” continued **Mr. Combs**. “This integration enables us to deliver a solution that improves the cost structure and risk profile of trust departments, while also providing them with a strategic business model that combines all wealth management functions on a single platform. We look forward to working with Envestnet to provide our integrated solution to other financial institutions that have or are looking to provide trust services.”

A recent white paper commissioned by Envestnet and compiled by Aite Group found bank and bank trust advisors that benefit from functional integration across all their business technology applications, as well as the automatic sharing of data between those applications, can shift about 20% of their time from operations to client engagement. This can lead them to generate 76% more revenue than their counterparts with basic or no integration. To download the white paper, “**Technology Integration Turbocharges Advisor Productivity: Making Time for Clients**,” please visit <http://bit.ly/2dXjiAc>.

As of September 30, 2016, over 60 banks, including commercial, regional, and national banks and trust companies in the U.S. and Canada, utilize the integrated Envestnet platform.

About Envestnet

Envestnet, Inc. (NYSE: ENV) is a leading provider of unified wealth management technology and services to financial enterprises and advisors. Our solutions unify and fortify the wealth management process, delivering unparalleled flexibility, accuracy, performance, and value. Envestnet enables the transformation of wealth management into a transparent, independent, objective, and fiduciary standard of care, and empowers enterprises and advisors to more fully understand their clients and deliver better outcomes.



Envestnet's Advisor Suite enables financial advisors to better manage client outcomes and strengthen their practices. Institutional-quality research and advanced portfolio solutions are provided through Envestnet | PMC, our Portfolio Management Consultants group. Envestnet | Yodlee is a leading data aggregation and data analytics platform powering dynamic, personalized financial apps and services for millions of consumers. Envestnet | Tamarac provides leading rebalancing, reporting, and practice management software for advisors.

More than 2,000 companies, including 15 of the 20 largest U.S. banks, 38 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>).

About National Advisors

National Advisors is a family of companies providing expert nationwide trust, custody and concierge services to trusted advisors and the families they serve. National Advisors is comprised of the following entities: National Advisors Trust Company, FSB; National Advisors Trust of South Dakota, Inc.; National Advisors Concierge Services; and National Advisors Holdings, Inc. Enriching lifelong relationships unites and unifies the professional staff of National Advisors. We embrace our clients with this common purpose, delivering a seamless, consistent experience across our family of companies. For more information about National Advisors, please visit www.natrustco.com.

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