ENVESTNET Tamarac

Introducing Tamarac Unified Managed Account Solution

As you look to offer your high-net-worth clients increasingly tailored investment strategies, reflecting your portfolio construction views, and incorporating the benefits of individual security ownership, we are committed to providing the flexibility and operational efficiencies that allow you to deliver greater value and exceptional levels of customization at scale.

We are pleased to introduce an important expansion of the Envestnet | Tamarac capability set: Unified Managed Account Solution – an easy way for you to consolidate management of SMAs and UMAs through integration with Envestnet's managed account platform.

Why Envestnet | Tamarac for Managed Accounts

- The leading RIA portfolio and accounting administration platform is offering direct access to one of the largest managed account and investment administration capabilities by AUM/AUA.
- Offering access to an expansive array of over 1,500 third-party separately managed accounts (SMAs), UMA account administration, and investment research tools.
- Helping you deliver cost-effective, customizable investment solutions to your clients.
- Providing access to Envestnet | PMC research, due diligence, thought leadership, and more.

5 Key Potential Benefits of a Unified Managed Account Solution

1

Optimize your operational efficiency with less administrative overhead and trading risk. Deliver your investment philosophy at scale. We manage individual account-level trading across multiple SMAs, including rebalancing, reconciliation, proxy vote support, corporate actions, and manager billing administration. The ability to maintain everything within a UMA environment streamlines the experience for you and your clients.

By combining multiple SMAs in a single account, you reduce the number of custodial accounts, statements, and tax documents you need to manage. Also, the platform eliminates the need to engage in direct contracts with managers; provides automated paperwork production; and offers a single point of contact to oversee and coordinate manager trading and activity.

2

Improve your competitive advantage with the potential for manager cost-savings and a higher degree of customization to meet individual investor needs through the benefits of individual security ownership. With approximately $35 billion* in SMAs on the Envestnet platform, you benefit from a dedicated manager-relations team, which has structured favorable pricing agreements with many of the industry's top asset managers.

3

Save more time preparing for client and prospect meetings with automated proposal generation, investment research, and analysis tools. Our platform offers risk assessment outputs explicitly branded for your firm, Monte-Carlo simulations, and portfolio analysis and comparison tools, all designed to improve client and prospect engagement and save you time and staff resources. You also have access to comprehensive research reviews and opinions to provide even more in-depth insight into the entire universe of SMA investment options.

4

Simplify the manager transition process. Our single-contract platform eliminates the need for multiple manager contracts or additional client signatures when you change managers.

5

Add value and customized solutions with differentiating services. We understand the importance of offering tailored solutions to meet your clients' unique needs and the Envestnet platform offers access to a broad array of financial wellness solutions. When tax efficiency or impact investing is essential to your clients, our overlay services provides you with the flexibility you need. To help you deliver an even broader suite of financial wellness solutions to your clients, our Credit Exchange and Insurance Exchange**, through the Envestnet platform, help you integrate lending and insurance solutions into the wealth management process.

*As of 12/31/2019.
**Other fees may apply.

Envestnet Managed Account Administration: By The Numbers

Over 1,500 third-party SMA strategies from which to choose.

A single contract platform improves efficiencies

for paperwork, contracting with managers and coordinating trades across multiple strategies.

Over 50 dedicated Envestnet | PMC investment professionals

provide qualitative and quantitative manager research reviews and opinions on over 4,000 manager products.

Over 400 back office professionals support every aspect of the Envestnet platform.

The trading team creates an average of 300,000 orders a day across 60+ custodians.

Why Successful Advisors Choose SMAs For Their High-Net-Worth Clients

- Offer the benefits inherent in direct ownership of securities instead of pooling ownership with other investors.
- The potential to manage individual tax consequences more advantageously by avoiding capital gains distributions, leveraging tax-loss harvesting, and adjusting security levels.
- The flexibility to implement custom security screens or restrictions.
- The ability to more explicitly tailor investment implementation to specific circumstances.

GET STARTED: Take part in our exclusive introductory offer of the Unified Managed Account Solution

For our valued Tamarac clients, we are offering a simplified institutional pricing model as we launch the Unified Managed Account Solution. Reach out to your Tamarac representative to learn more by calling 844-214-8152 or emailing TamaracSales@Envestnet.com.

Don't miss the latest insights from the Envestnet | Tamarac team. Visit our blog for our perspective on the financial services industry and information about our platform and solutions. Visit Envestnet Institute to access on-demand resources from a variety of asset managers in one consolidated location, including webinars, articles, podcasts, and more. Follow us on social media for news and other updates.

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Envestnet | Tamarac, a division of Envestnet, Inc. (NYSE: ENV), is leading provider of integrated, web-based portfolio rebalancing, performance reporting and customer relationship management software for independent advisors and wealth managers.

All advisory services herein are provided by an affiliated entity, Envestnet Asset Management Inc., a Registered Investment Adviser.

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