

Investnet | Yodlee Aggregation Platform for Salesforce Financial Services Cloud

The Investnet® | Yodlee® integration with Salesforce® Financial Services Cloud provides advisors a single, comprehensive view of the data they need to build deeper one-to-one client relationships, make smarter investment decisions, and engage with clients on any device. Investnet | Yodlee has partnered with Salesforce to build a powerful technology model, Salesforce Financial Services Cloud, which provides wealth management advisors with their clients' financial data along with CRM to holistically manage their clients' financial lives.

Advantages for Businesses

- Centralized data hub for managed and held away accounts
- Improve job productivity
- Improve data insight for cross selling campaigns
- Assists "Know Your Client" requirements
- Easily integrate applications in the Salesforce ecosystem

Advantages for Advisors – Integrated Solution

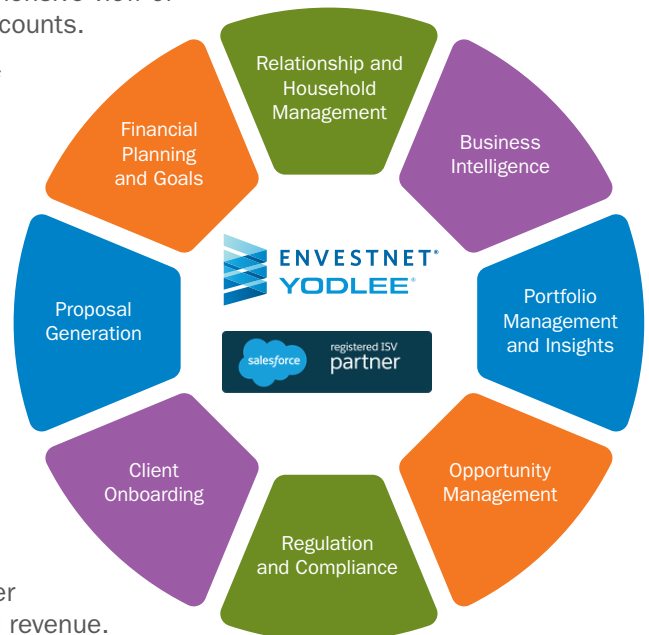
- Holistic view of clients' financial life
- Easy-to-use reports and dashboards
- Improve productivity
- Increase assets under management
- Provide a smooth onboarding process
- Optimize up-selling and cross-selling efforts

Connect with Clients

The wealth management sector is fiercely competitive and getting more so every day. There is an enormous amount of pressure on traditional wealth advisory firms due to the digital revolution, big data, a changing demographic, and a historic level of generational wealth transfer. In this environment, it's hard to know how to begin or what to tackle first. However, with challenge and turmoil come immense opportunities. Wealth management firms that can get ahead of the curve and turn it to their advantage have much to gain.

The key to getting the upper hand in this environment is data—accessing it, harnessing it, and using it to advisors'—and ultimately their clients'—advantage. To help achieve this, Investnet | Yodlee has partnered with Salesforce to build a powerful and entirely new omni-channel application experience. By connecting Investnet | Yodlee's industry leading account aggregation solution with the Salesforce Financial Services Cloud, advisors will now be able to collect and connect user-permissioned end-user account data from over 15,500 sources (such as bank accounts and 401ks) to provide advisors professionals with a holistic view of their client's finances across accounts, which allows for more streamlined processes and smarter investment decisions. Activity and information can move seamlessly from Investnet | Yodlee to Salesforce, giving advisors a single, comprehensive view of their clients' held away accounts.

With a 360-degree view of their clients' financial accounts, advisors can now deliver smarter, more personalized engagements that lead to increased assets under management and improved regulatory compliance. Firms also enjoy greater transparency for ever-increasing "Know Your Client" requirements. Finally, the open-standard, cloud-based Salesforce platform will enable greater productivity and increased revenue.



Advantages for Clients – Integrated Solution

- Improve service, efficiency, and overall experience
- Richer, more useful customer service
- Plug and play widgets for customer facing portals
- Truly customized solutions and approaches
- Greater automation and more streamlined processes
- Enable data-based, real-time advice

Tap Into an Unmet Need

With Envestnet | Yodlee's data on the Salesforce platform, businesses are positioned to help clients achieve their financial goals and bring assets in-house. Detailed information includes:

- Account summary data across all of a client's financial accounts – investment, banking, credit cards and loans
- Investment holdings
- Liability balances
- Home and property values

Account Name	Amount	Last Update
DAG Site - Investments	\$ 69,876,521.00	18 hours ago
Versight - Investments	\$ 9,116.67	2 days ago
TOTAL:	\$ 69,887,637.67	

Add Accounts for a Holistic View.

Category	Item Name	Account Name	Nickname	Account Number	Running Balance	
Credit Cards	American Express	Platinum Delta SkyMiles	Delta Amex	xxxx3002	\$6,126.46	
	Macy's	Macy's CC	Macy's Amex	xxxx5722	\$35.25	
Loans	Wells Fargo	Loan		xxxx3885	\$10,084.33	
Investment Accounts	Edward Jones	Trad IRA-1	Jones Retirement	xxxx5622	\$157,321.31 (6/12/2015)	
	Versight	Yodlee Inc 401K Plan	Yodlee 401K	xxxx0031	\$8,437.08 (6/2/2015)	
Holdings	FRBAS	Franklin Total Return Fund CL A		2,290.68	\$10.08	\$23,090.05
	FKGGS	Franklin Flex Cap Growth Fund CL A		166.28	\$52.74	\$8,768.71
	FRDIX	Franklin Dynatech Fund CL A		324.46	\$49.81	\$16,161.15
	FRGGS	Franklin Growth Series Class A		344.76	\$78.08	\$26,918.54
	FRGDL	Franklin Rising Dividends Fund CL A		319.65	\$52.94	\$16,922.11
	FRDIL	Franklin Mutual Global Discovery Fund CL A		820.31	\$34.72	\$28,421.26
	TEMEX	Templeton Foreign Fund CL A		1,575.31	\$7.56	\$11,909.32
	TEMGX	Templeton Global Smaller Companies Fund CL A		1,380.91	\$9.15	\$12,635.35
	TEELX	Templeton Growth Fund		503.92	\$24.69	\$12,441.83
	VMSGX	Vanguard Mid Cap Growth		236.10	\$26.13	\$6,169.19

Aggregated View of Finances.

Client Name	Investment Reports	Banking Reports	Credit Card Reports	Total Net Worth
Mary Sporno	\$163,437.51	\$45.16	\$4,161.71	\$167,644.38
Martin Columbe	\$162,389.31	\$90.32	\$45.16	\$162,624.79
Tanya Columbe	\$45.16			\$45.16

Net Worth Report Summary.

To learn more, please contact an Envestnet | Yodlee sales representative.



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