

Envestnet | Yodlee Aggregation Platform for Salesforce Financial Services Cloud

The Envestnet[®] | 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. Envestnet | 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 crossselling 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, Envestnet | Yodlee has partnered with Salesforce to build a powerful and entirely new omni-channel application experience. By connecting Envestnet | 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 Envestnet | Yodlee to Salesforce, giving advisors a single, comprehensive view of their client's.

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 everincreasing "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

All Accounts	+ Add Account 🖨 Pri
View by Account Type Usew by Assets & Liabilities	
Investments (2)	Amour
Dag Site - Investments DAG INVESTMENT - XXXX5555 Go to site Settings	\$ 69,878,521.0 18 hours ag
Verisight - Investments O Refresh VODLEE INC 401K PLAN - xxxxx0031 Go to site Settings	<u>\$ 9,116.6</u> 2 days ag
	TOTAL: \$ 69,887,637.6

Aggregated View of Finances.

Add Accounts for a Holistic View.

Credit Ca	irds	New Credit Card						Credit Cards Help	
Action	Institution	Account Name	N	ckname	Account Number			Running Balance	
Edit Del	American Express	Platinum Delta Skymiles	Delta Amex xxxx3		x000:3002		\$6,12		
Edit Del	Macy's	Macys CC	м	Macy's Amex xxxx5722			\$3		
Loans		New Loan						Loans Help	
Action	Institution	Account Name	Nickname	Account Number				Principal Balan	
Edit Del	Wells Fargo	Loan	Loan	xxxx3885				\$10,084.3	
Investme	nt Accounts	New Investment	Account				Investi	ment Accounts Help	
Action	Institution	Account Name	Nickname	Account	Number		Total Balance	As Of Date	
Edit Del	Edward Jones	Trad IRA-1	Jones Retirement	xxxx5622			\$157,321.31	6/1/2015	
Edit Del	Verisight	Yodlee Inc 401K Plan	Yodlee 401K	xxxx0031			\$8,437.08 6/2/2015		
Holdings		New Holding						Holdings Help	
Action	Holding Name	Description				Quantity	Price	Vali	
Edit Del	FKBAX	Franklin Total Return Fund CL A				2,290.68	\$10.08	\$23,090	
Edit Del	FKCGX	Franklin Flex Cap Growth Fund CL A		166.28	\$52.74	\$8,768.			
Edit Del	EKDNX	Franklin Dynatech Fund CL A				324.46	\$49.81	\$16,161.	
Edit Del	FKGRX	Franklin Growth Series Class A				344.76	\$78.08	\$26,918.5	
Edit Del	FRDPX	Franklin Rising Dividents Fund CL A				319.65	\$52.94	\$16,922.1	
Edit Del	TEDIX	Franklin Mutual Global Discovery Fur		820.31	\$34.72	\$28,421.			
Edit Del	TEMEX	Templeton Foreign Fund CL A		1,575.31	\$7.56	\$11,909.			
Edit Del	TEMGX	Templeton Global Smaller Companie		1,380.91	\$9.15	\$12,635.3			
Edit Del	TEPLX	Templeton Growth Fund				503.92	\$24.69	\$12,441.0	
	VMGRX	Vanguard Mid Cap Growth				236 10	\$26.13		

INVESTMENT REPORTS Investments						BANKING REPORTS Bank Accounts			CREDIT CARD REPORTS Credit Cards			
Institution	Account Name *	Holding Name	Quantity	Price	Value	Institution	Account Name	Current Balance	Institution	Account Name	Running Balance *	Instit
Full Name: Harry 3	Sporran				\$163,437.51			\$45.16			\$6,161.71	
Edward Jones	Trad IRA-1	TEDIX	820.31	\$34.72	\$28,421.26	Ally Bank	Interest Checking	\$45.16	Macy's	Macys CC	\$35.25	Well
Edward Jones	Trad IRA-1	TEMEX	1,575.31	\$7.56	\$11,909.32				American Express	Platinum Delta Skymiles	\$6,126.46	
Edward Jones	Trad IRA-1	FKGRX	344.76	\$78.08	\$26,918.54							
Edward Jones	Trad IRA-1	TEPLX	503.92	\$24.69	\$12,441.83							
Edward Jones	Trad IRA-1	EKBAX	2,290.68	\$10.08	\$23,090.05							
Edward Jones	Trad IRA-1	TEMGX	1,380.91	\$9.15	\$12,635.35							
Edward Jones	Trad IRA-1	ERDPX	319.65	\$52.94	\$16,922.11							
Edward Jones	Trad IRA-1	EKDNX	324.46	\$49.81	\$16,161.15							
Edward Jones	Trad IRA-1	FKCGX	166.28	\$52.74	\$8,768.71							
Verisight	Yodlee Inc 401K Plan	VMGRX	236.10	\$26.13	\$6,169.19							
Full Name: Martin	Cromble				\$162,388.31			\$90.32				
First Republic Bank	FRB 401(k) Retirement	CASH	87,088.31	\$1.00	\$87,088.31	Ally Bank	Interest Checking	\$45.16				
Verisight	Verisght 401(k)	GOLD	75,300.00	\$1.00	\$75,300.00	Ally Bank	Interest Checking	\$45.16				
Full Name: Tanya	Crombie							\$45.16				

Net Worth Report Summary.

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



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