Envestnet Wealth Data Platform

Envestnet Data & Analytics

Creating opportunities for decisive action by transforming disconnected data sets into useful analytics and next best actions.

The Data & Analytics platform architecture features flexible and modular components so you can deploy solutions that drive revenue and provide targeted services to your customers.
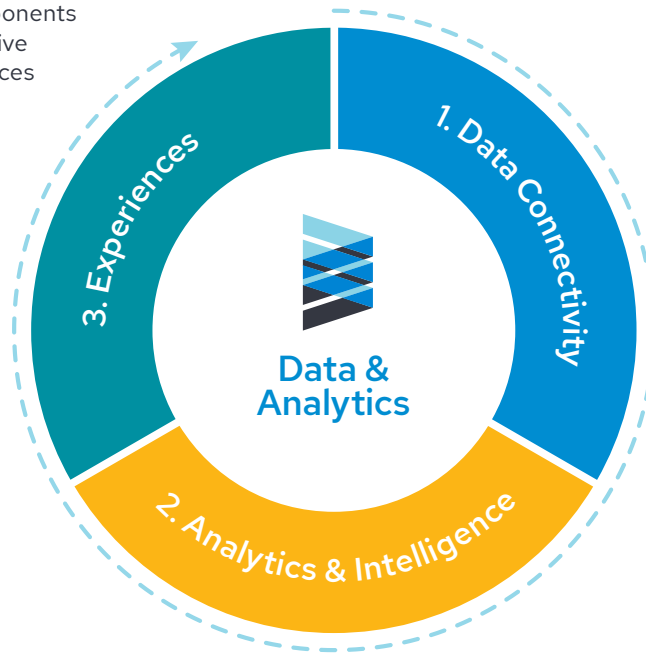
1. Data Connectivity
- Transactions and Investment Data
- Enrichment
- Ecosystem and Third-Party Data
- Account Linking

2. Analytics & Intelligence
- AI and Machine Learning
- Business Intelligence
- Goals Cashflow, and Payments
- Next Base Actions

3. Experiences
- Tools, APIs
- Insights
- Advisor
- Embedded Aplications
- Enterprise User

Data & Analytics

3. Experiences
1. Data Connectivity
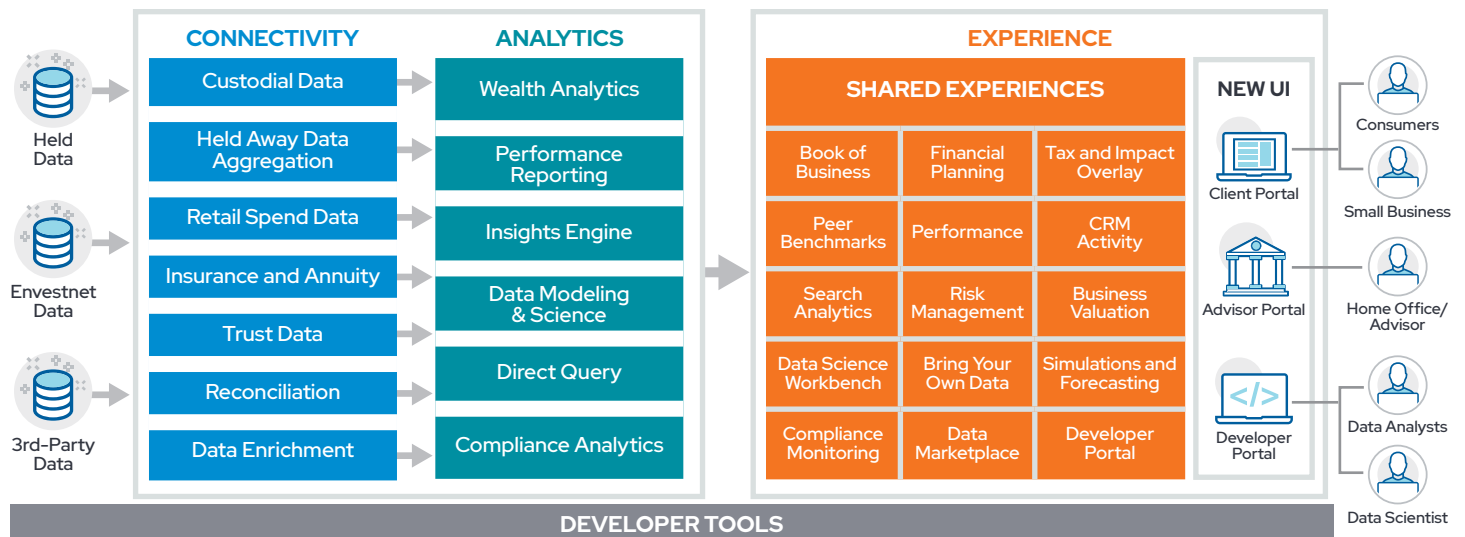2. Analytics & Intelligence

Maximize the impact of your advice—use Insights Engine to:

- **Surface client inflows** such as new accounts, and income streams that can be put to work to meet clients' goals
- **Uncover gaps** in life insurance coverage and ways to close them
- **Identify non-managed accounts** with high risk asset classes for managed account conversion
- **Find unrealized losses** for use in tax planning and strategy
- **Identify Environment, Social, & Governance** overlays and products for socially conscious investors
- **Discover high interest** real estate loans that could be refinanced

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The platform and partner for intelligent wealth companies.

CONNECTIVITY	ANALYTICS
Custodial Data	Wealth Analytics
Held Away Data Aggregation	Performance Reporting
Retail Spend Data	Insights Engine
Insurance and Annuity	Data Modeling & Science
Trust Data	Direct Query
Reconciliation	Compliance Analytics
Data Enrichment	

Held Data
Envestnet Data
3rd-Party Data

EXPERIENCE

SHARED EXPERIENCES

Book of Business	Financial Planning	Tax and Impact Overlay
Peer Benchmarks	Performance	CRM Activity
Search Analytics	Risk Management	Business Valuation
Data Science Workbench	Bring Your Own Data	Simulations and Forecasting
Compliance Monitoring	Data Marketplace	Developer Portal

NEW UI

Client Portal — Consumers, Small Business
Advisor Portal — Home Office/ Advisor
Developer Portal — Data Analysts, Data Scientist

DEVELOPER TOOLS