

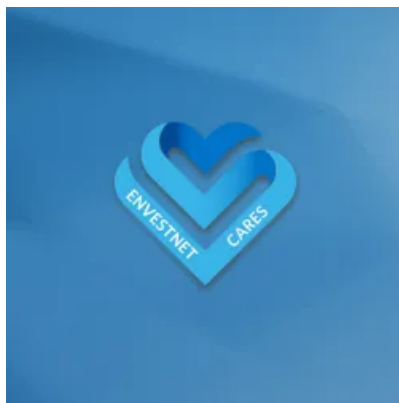


BEST INTEREST RULE

## REGULATION BEST INTEREST: ENFORCEMENT AND LITIGATION RISKS

📅 NOVEMBER 18, 2019

The new SEC standards of conduct for broker-dealers and Registered Investment Advisors are here...



ENVESTNET CARES / PHILANTHROPY

## ENVESTNET CARES: OUR FOCUS ON CHARITABLE GIVING

📅 NOVEMBER 15, 2019

Jud Bergman, our late Chairman and CEO, championed the importance of philanthropy and believed that Envestnet has a responsibility to invest in the communities in which we do business and to support our employees...



BLACKROCK / FINANCIAL PLANNING / MUTUAL FUNDS / TAXES

## CAPITAL GAIN TAXES: HELP YOUR CLIENTS SAVE

📅 NOVEMBER 6, 2019

April 15th is months away, and taxes are likely to be one of the last financial concerns your clients are thinking about at this time of year...

RELEASE / TECHNOLOGY

## REVIEW KEY UPDATES FROM OUR SECOND RELEASE OF 2019

📅 OCTOBER 29, 2019

Our latest technology updates went live on the Envestnet platform in August, featuring hundreds of improvements intended to enhance the user experience, based on feedback,,,

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BILL CRAGER / TECHNOLOGY

## **CONTINUAL INNOVATION**

📅 OCTOBER 24, 2019

As we look to the future of Envestnet and think about ways in which we can accelerate our growth and the value we provide our clients, I'm very pleased to share that we recently completed our first global hackathon...

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BLACKROCK / FINANCIAL PLANNING / RETIREMENT

## **IRETIRE: THE GATEWAY TO FINANCIAL PLANNING**

📅 OCTOBER 24, 2019

When it comes to retirement, the top concern cited by Americans is running out of money.<sup>1</sup> In fact, according to a Bankrate Financial Security Index...

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ESSENTIAL ADVISOR

## **THE 2019 ESSENTIAL ADVISOR AWARDS: TRACI GARNETT-FROSCHER**

📅 OCTOBER 22, 2019

The financial services industry is constantly evolving, especially as a result of increasingly innovative technology. In turn, advisors need to...

## CONGRATULATIONS TO OUR 2019 CITYWIRE RISING STARS

📅 OCTOBER 17, 2019

We're excited to announce that Envestnet's Brooks Friederich and David Hawal have been named to Citywire's list of Professional Buyer Rising Stars for 2019...

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BILL CRAGER / ENVESTNET INSTITUTE ON CAMPUS / FINANCIAL WELLNESS

### MAKING FINANCIAL WELLNESS MORE ACCESSIBLE

📅 OCTOBER 2, 2019

I recently had the honor of participating in a panel at the 2019 National Historically Black Colleges and Universities Week Conference, a White House initiative.

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ASSET MANAGEMENT

### OUR LATEST RESEARCH ON ACTIVE VERSUS PASSIVE ASSET MANAGEMENT

📅 SEPTEMBER 30, 2019

As you are likely well aware, the debate regarding active versus passive investing has existed for a while. And recently, headlines seem to increasingly indicate that active investing has run its course.

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