



For Immediate Release

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Investnet Empowers Mercer Advisors With Unified Platform Across RIA & Trust Divisions

Mercer Advisors Harnesses Enhanced Integration Between Investnet & National Advisors' Family of Companies to Unify its Wealth Management Offering

CHICAGO—February 1, 2017—Investnet, Inc. (NYSE: ENV) is providing Mercer Advisors Inc. with access to a unified end-to-end platform that enables the fee-only total wealth management firm to seamlessly service all RIA and trust assets.

Mercer Advisors (<http://www.merceradvisors.com>) is the parent company of Mercer Global Advisors, one of the largest RIA and financial planning firms in the U.S. with more than \$9 billion in assets under management and over 6,000 clients. As part of its ongoing growth, Mercer Advisors acquired Kanaly Trust, a Houston-based provider of comprehensive wealth management, financial planning and trust/estate services to families, individuals and estates, earlier this year. In addition to managing and advising on more than \$2 billion in assets on behalf of over 500 families, Kanaly Trust serves as the trustee or executor for estates that total more than \$2.5 billion.

Investnet's technology development strategy over the past several years—along with its capability to integrate with multiple trust accounting, custody and trading systems—have created a unified platform whereby RIAs like Mercer Advisors, as well as banks and independent trust companies, can deliver a consistent experience for clients across their broker-dealer, advisory and trust divisions.

“As advisory, brokerage and trust services rapidly converge, we provide wealth management organizations with a single, fully integrated technology solution that enables them to seamlessly manage all assets across their multiple business lines,” said **John Yackel, Executive Managing Director and Head of Institutional Business Development at Investnet**. “We look forward to continuing to grow our relationship with Mercer Advisors to help its RIA and trust advisors deliver better client outcomes using our unified wealth management platform.”

Investnet recently deepened its integration and relationship with National Advisors' family of companies. This enhanced integration makes it possible for RIAs, banks and independent trust companies to benefit from a unified offering that combines Investnet's wealth management and investment advice/products platform with National Advisors' trust services and investment processing solutions.

Mercer Advisors is the first mutual client of Investnet and National Advisors to leverage the combined platforms' solutions, including:

- Investnet's Client Portal, which delivers access to Investnet | Yodlee's data aggregation and financial wellness solutions
- Integrated Logix financial planning software
- Portfolio management and overlay trading tools
- Investment policy rules and compliance oversight



- Client reporting and performance measurement
- Custodian-agnostic integrations
- National Advisors' branded administrative trust services in a corporate-directed trustee model

“Leveraging both Envestnet and National Advisors is a powerful combination, making it possible for us to demonstrate more value to clients using a broad range of single-source wealth management and trust administration and advisory services,” said **David Barton, CEO of Mercer Advisors**. “This unified offering will help us ensure that all client assets, regardless of division or practice area, can be managed effectively as we continue with our efforts to build a leading nationwide wealth manager.”

“Partnering with Envestnet helps us provide a high level of service to all our clients,” said **Donald Calcagni, Chief Investment Officer of Mercer Advisors**. “We found Envestnet’s low-cost, factor-enhanced SMA solutions particularly attractive given our firm’s quantitative, multi-factor investment philosophy and high-net-worth client base—but they bring more to the relationship than just asset management solutions. Their sophisticated tax and SRI overlays, UMA/UMH technology, integrated financial planning technology and state-of-the-art performance reporting empower our advisors to deliver best-in-class service, customization and advice to our clients.”

About Envestnet

Envestnet, Inc. (NYSE: ENV) is a leading provider of unified wealth management technology and services to financial enterprises and advisors. Our solutions unify and fortify the wealth management process, delivering unparalleled flexibility, accuracy, performance and value. Envestnet enables the transformation of wealth management into a transparent, independent, objective, and fiduciary standard of care, and empowers enterprises and advisors to more fully understand their clients and deliver better outcomes.

Envestnet’s Advisor Suite enables financial advisors to better manage client outcomes and strengthen their practices. Institutional-quality research and advanced portfolio solutions are provided through Envestnet | PMC, our Portfolio Management Consultants group. Envestnet | Yodlee is a leading data aggregation and data analytics platform powering dynamic, personalized financial apps and services for millions of consumers. Envestnet | Tamarac provides leading rebalancing, reporting and practice management software for advisors. Envestnet | Retirement Solutions provides retirement advisors with an integrated platform that combines leading practice management technology, research and due diligence, data aggregation, compliance tools, fiduciary solutions and intelligent managed account solutions.

More than 52,000 advisors and 2,500 companies including: 16 of the 20 largest U.S. banks, 38 of the 50 largest wealth management and brokerage firms, over 500 of the largest Registered Investment Advisers, and hundreds of Internet services companies, leverage Envestnet technology and services. Envestnet solutions enhance knowledge of the client, accelerate client on-boarding, improve client digital experiences, and help drive better outcomes for enterprises, advisors, and their clients.

For more information on Envestnet, please visit www.envestnet.com and follow [@ENVintel](https://twitter.com/envintel) (<https://twitter.com/envintel>).

About Mercer Advisors

Established in 1985, Mercer Advisors Inc. is a total wealth management firm that provides comprehensive, fee-only investment management, financial planning, family office services, retirement benefits and distribution planning, estate planning, and tax management services to affluent individuals. Mercer Advisors is the parent company of Mercer Global Advisors, one of the largest Registered Investment Advisers and financial planning firms in the U.S. with over \$9 billion in assets under management and more than 6,000 clients. Headquartered in Santa Barbara, California, Mercer Advisors



is privately held, has over 190 employees, and operates nationally through 21 branch offices across the country. For more information, visit www.merceradvisors.com.

About National Advisors

National Advisors is a family of companies providing expert nationwide trust, custody and concierge services to trusted advisors and the families they serve. National Advisors is comprised of the following entities: National Advisors Trust Company, FSB; National Advisors Trust of South Dakota, Inc.; National Advisors Concierge Services; and National Advisors Holdings, Inc. *Enriching lifelong relationships* unites and unifies the professional staff of National Advisors. We embrace our clients with this common purpose, delivering a seamless, consistent experience across our family of companies.

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