ENVESTNET

Frequently Asked Questions

The Next Generation Proposal

Enhancing the legacy Proposal to meet evolving client needs

At Envestnet, we are constantly enhancing our ecosystem to help grow and empower intelligent, connected financial lives.

Managing a client's financial life starts with the financial plan, what we see as the foundation of the advisor-client relationship. The next generation of our Proposal tool helps bring financial plans to fruition by seamlessly connecting client needs with Envestnet solutions, no matter where they are along their financial wellness journey.

To help you better understand what the next generation Proposal offers, here are some of our most frequently asked questions.

1. **What is the next generation Proposal?**
   Our streamlined advisor tool helps you efficiently execute financial plans while easing the client onboarding process. Our next generation Proposal is powered by Envestnet's latest cloud platform technology, and seamlessly integrates with all of our services through the Envestnet unified advice platform.

2. **How do you access the new tool?**
   You can access the next generation Proposal the same way that you currently utilize the legacy Proposal. Access is available directly through Envestnet's unified advice platform or through targeted SSOs. Your Envestnet representative can provide more details on enablement.

3. **How does the new tool work?**
   Our next generation Proposal pulls together many of the platform's integrated services to help simplify the user experience. It allows you to do it all - from generating sales collateral through to building, onboarding, and implementing a comprehensive household proposal. You can now do all of this from one unified place that is designed to drive informed decisions and simplify the account management process.

4. **When was next generation Proposal live in production?**
   The tool launched in November 2019. Iterative testing, piloting and development have been driving ongoing improvements to prepare for a broad market rollout.

5. **Why was the next generation Proposal developed?**
   The tool was developed to provide a more streamlined and connected experience for the advisor-client relationship, especially when transitioning from planning to implementation. The intuitive framework of our Proposal tool only requires minimal input to move the discussion forward in real-time. With our enhanced tool, planning sessions are more interactive and keep the focus on your client's needs. Our enhancements are based on years of feedback and research - integrating the latest technology capabilities that Envestnet offers.

6. **How does the new tool benefit the advisor-client relationship?**
   The financial plan is the foundation of the advisor-client relationship, and our next generation Proposal empowers advisors to connect client needs with Envestnet solutions seamlessly. Our tool also allows advisors to work with their clients to determine risk, present educational content, propose solutions, adjust strategies, and much more all in real-time.

7. **Why does the next generation Proposal look different than the legacy tool?**
   Our next generation Proposal is built within an improved user interface framework and powered by the Envestnet Unified Design System. It displays only what the user needs to see and helps provide a more simplistic and streamlined experience. With the new UI's adaptable framework, we can seamlessly incorporate future updates in no time at all.

8. **What are next steps?**
   Our next generation Proposal operates on our existing platform and does not require any type of reconfiguration or changes to your settings. If you have questions about getting started, please visit our Help Center or reach out to your Envestnet representative.