

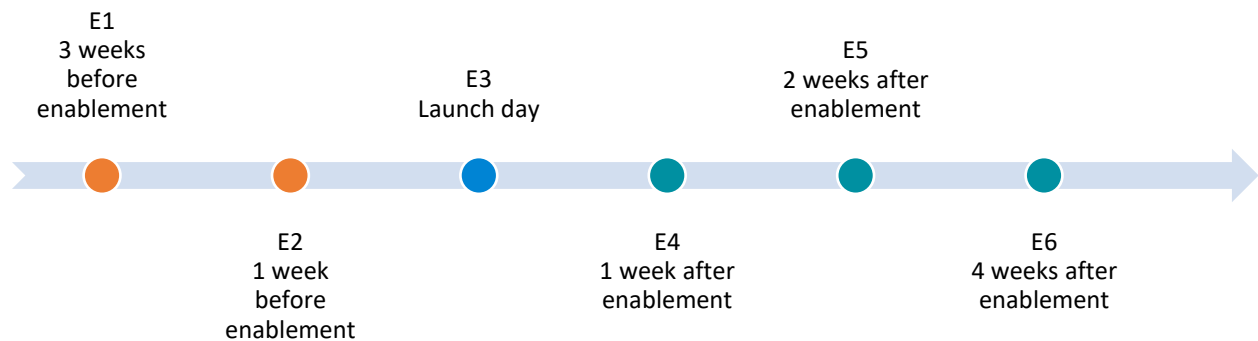
Sample Advisor Rollout Emails

Contents

Suggested Cadence for launch.....	1
Terms of Use for Email Copy.....	1
Email 1 – Initial Announcement.....	2
Email 2 – A week before enablement.....	3
Email 3 – Launch Day	4
Email 4 – A week after enablement – Help Center call out.....	5
Email 5 – Two weeks after Enablement – Online Training call out.....	6
Email 6 – Repeat Launch Day.....	7

Suggested Cadence for launch

The emails below and schedule is a suggested communication plan that you can use to help rollout the next generation of our Proposal tool. After email six, you can repeat four and five.



Terms of Use for Email Copy

Envestnet is not responsible for compliance review of white labeled material. Please have your internal compliance perform their own review.

Please include the following in your disclosure:

[Your Firm] and Envestnet are separate and unaffiliated firms, and are not responsible for each other's services or policies. This email should not be construed as a recommendation or endorsement of any particular product, service, or firm.

Email 1 – Initial Announcement

Subject line: The opportunity is ahead

Introducing The Next Generation Proposal

Dear [NAME VALUE],

After years of research, advisor feedback, and technology innovations, Envestnet is ready to enable the next generation of their Proposal tool. Why? Because the next generation Proposal tool - the fast way to build and present investment strategies - accelerates the wealth management process, moving clients from planning to investing assets with as little friction as possible.

How does this impact you?

Starting on [ENABLEMENT DATE] you'll notice a new option on your Quick Start menu. <If enabled at your firm> Click "Proposal" from the menu and generate your first Proposal using the enhanced design and work flow. This enablement is an addition to the legacy Proposal Generation Tool, but we're certain it will quickly become your "go to" Envestnet application for:

- Assessing client risk
- Finding the right investment products
- Generating pitch documents
- Setting up accounts
- Gathering e-signatures

If you'd like a more structured learning experience leading up to [ENABLEMENT DATE], start Envestnet's [Online Training](#) now.

Next steps

- Take the online training for a next generation Proposal deep dive
- Review some of our [frequently asked questions](#)
- On [ENABLEMENT DATE] click the new tool, run a Proposal, explore

Contact [your support representative] if you have any questions leading up to enablement.

Disclosure:

[Your Firm] and Envestnet are separate and unaffiliated firms, and are not responsible for each other's services or policies. This email should not be construed as a recommendation or endorsement of any particular product, service, or firm.

Email 2 – A week before enablement

Subject line: The Next Generation Proposal is Almost Here!

Get Ready for Technology at the Speed of Business

Dear [NAME VALUE],

[ENABLEMENT DATE] is almost here, and we couldn't be more excited for you to experience the future of Envestnet's Proposal tool. Here's a quick recap since the last communication.

The next generation Proposal tool is launching soon. The tool builds upon Envestnet's powerful engine driving the legacy Proposal Generation Tool to bring you a more streamlined experience. Envestnet enhanced the Proposal after years of research and feedback to leverage cross platform technology and data tools to modernize implementing financial plans.

If you haven't explored the online training for the next generation Proposal, it's not too late. [Click here](#) to experience Envestnet's series of modules geared toward getting you up and pitching investment strategies in no time.

If you'd like to read more about the opportunity ahead, here are some great resources to review in addition to the training.

- [Capabilities Guide](#)
- [Fact Sheet](#)
- [FAQ](#)

Contact [your support representative] if you have any questions leading up to enablement.

Disclosure:

[Your Firm] and Envestnet are separate and unaffiliated firms, and are not responsible for each other's services or policies. This email should not be construed as a recommendation or endorsement of any particular product, service, or firm.

Email 3 – Launch Day

Subject: Welcome to Next Generation Proposal

Next Generation Proposal is Live!

Dear [NAME VALUE],

Get ready to showcase your value in a whole new way. You can start benefiting from Envestnet's enhanced Proposal tool today! Click Proposal from your Quick Start menu *<or location based on configuration>* and experience a new streamlined workflow that can help you profile, propose, and present investment strategies faster than ever before.

What do you need to get started?

We have the resources you need to use the new tool as well as or better than the legacy Proposal Generation Tool. Browse the available resources to help make the next generation Proposal part of your everyday practice.

- [Online Training Courses](#)
- [Capabilities Guide](#)
- [Fact Sheet](#)
- [FAQ](#)

And after you've opened the tool, there is an entire library of Proposal help articles available on demand in our Help Center. Access is easy. Use the message box icon at the bottom right hand corner of any window within the Proposal tool and click "Help Center" to access Envestnet's resource library.

What's my next step?

Open Envestnet's Enterprise Platform, access the next generation Proposal, and explore.

We are confident that the Help Center can cover most of the questions you may have. If not, please contact *[your support representative]*.

Disclosure:

[Your Firm] and Envestnet are separate and unaffiliated firms, and are not responsible for each other's services or policies. This email should not be construed as a recommendation or endorsement of any particular product, service, or firm.

Email 4 – A week after enablement – Help Center call out

Subject line: Proposal help on demand

Next Generation Proposal Resources

Dear [NAME VALUE],

Envestnet's next generation Proposal build started with Advisor needs and backed into the technology. This advisor forward tool is geared toward establishing you as the essential partner your clients need to reach their financial goals. It follows a streamlined process that helps showcase your unique value:

[ASSESS CLIENT RISK > RESEARCH INVESTMENTS> GENERATE A PITCH> SET UP ACCOUNTS> PROCESS E-SIGNATURES](#)

Because in the end it's less about product and more about you.

Have you explored your Proposal resources?

Next Generation Proposal Help Center: This vault of help articles provides step-by-step visual instructions, from starting a proposal to funding it, and all things in between. This hub leaves no stone unturned and will be a great tool for users of all levels.

For help: Click the chat box in the bottom right corner of the Proposal screen. Click Help Center. And you're there.

Online Training: If you benefit from on-demand training, Envestnet breaks using the tool into seven lessons with an assessment at the end. We administer the same training to our internal teams and are confident in the results. Try it [here](#).

We are confident that the on-demand help and training tools can cover most of the questions you may have. If not, please contact [\[your support representative\]](#).

Disclosure:

[\[Your Firm\]](#) and Envestnet are separate and unaffiliated firms, and are not responsible for each other's services or policies. This email should not be construed as a recommendation or endorsement of any particular product, service, or firm.

Email 5 – Two weeks after Enablement – Online Training call out

Subject: You can't be late for this class

Next Generation Online Training

Dear [NAME VALUE],

Investnet created the next generation of our Proposal tool in order to ensure that you have a powerful sales and onboarding tool that operates at the speed of business. Expect no less from their help resources.

Bottom line

Proposal Online Training is available for use today. Click [here](#) to take advantage of the training right now. Still hesitant? See the value below.

- Each video segment of the training provides the information you need to complete each step of the proposal process. No filler.
- You can complete all seven segments in under an hour.
- The Online Training remembers your place. Stop, start again, and finish on your time.
- At the end of the training take the assessment and be confident in your knowledge when you pass.

The on-demand help and training tools can cover most of the questions you may have. If not, please contact [\[your support representative\]](#).

Disclosure:

[\[Your Firm\]](#) and Investnet are separate and unaffiliated firms, and are not responsible for each other's services or policies. This email should not be construed as a recommendation or endorsement of any particular product, service, or firm.

Email 6 – Repeat Launch Day

Subject line: [RECAP] The opportunity is in front of you

Building Upon Your Legacy

Dear [NAME VALUE],

If you haven't heard, the next generation of Envestnet's Proposal tool is here! You can start benefiting from Envestnet's enhanced Proposal tool today! Click Proposal from your Quick Start menu [<or location based on configuration>](#) and experience a new streamlined workflow that can help you profile, propose, and present investment strategies faster than ever before.

What do you need to get started?

We have the resources you need to use the new tool as well as or better than the legacy Proposal Generation Tool. Browse the available resources to help make the next generation Proposal part of your everyday practice.

- [Online Training Courses](#)
- [Capabilities Guide](#)
- [Fact Sheet](#)
- [FAQ](#)

And after you've opened the tool, there is an entire library of Proposal help articles available on demand in our Help Center. Access is easy. Use the message box icon at the bottom right hand corner of any window within the Proposal tool and click "Help Center" to access Envestnet's resource library.

What's my next step?

Open Envestnet's Enterprise Platform, access the next generation Proposal, and explore.

We are confident that the Help Center can cover most of the questions you may have. If not, please contact [\[your support representative\]](#).

Disclosure:

[Your Firm] and Envestnet are separate and unaffiliated firms, and are not responsible for each other's services or policies. This email should not be construed as a recommendation or endorsement of any particular product, service, or firm.