Fact Sheet

The Next Generation Proposal

Driving Better Outcomes

The next generation of our Proposal tool was built to accommodate your clients' evolving short and long-term needs, helping them live a more connected, intelligent financial life as they march toward the ultimate goal of financial wellness. Our Proposal helps you implement and fund holistic financial plans, guiding you each step of the way from risk assessment to finding the right investment products, generating a pitch document, setting up account details – fees, restrictions, and funding – to gathering e-signatures. Simply said, we help you put client assets to work faster than ever. Here's how.

Key Facts At-A-Glance

Showcase your value.
Benefit from streamlined steps, tools, and information that can help you successfully propose and present investment strategies to clients. Less product, more you.

Leverage with ease.
No matter your level of expertise, you can confidently use the tool to help build, grow, and sustain a book of business.

Engage with your prospects or clients.
With minimal input, the Proposal displays the logical next step of the investing process. Information renders clearly, utilizing natural speech and flow, so that screen sharing with your client or prospect is possible.

Streamline decision-making.
Involve clients from the first keystroke for full transparency, and develop confidence early in the investing process. Your discussions will gain focus and new meaning as a result, leading to faster and more informed decisions from clients or prospects.

Seamlessly bring in clients' data from other systems.
Through the Envestnet unified advice platform and our integrated services, the Proposal tool can seamlessly access client data across other systems. The embedded entry, upload, and digital signature features save on operational processing time and can help eliminate manual processing errors.

Advisor Value	Client Value	Home Office Value
• Choice - Access a broad range of programs and products to fit any scenario. • Consolidation – Uncover and incorporate simplified assets into what is being proposed and what will be in client reporting. • Confidence – Propose and present to clients in a single interface designed to minimize stress and indecision. • Compensation – Create fewer and more comprehensive proposals to increase your close rate and decrease time to invest. • Competitive edge - Prefill, analyze, propose, onboard, implement, and invest, all from one integrated tool.	• Simplified and more easily understood terms, workflows, and presentations. • Ability to examine proposed changes considering held and held-away accounts, so decisions are not made in a silo. • Ability to easily provide input through client portal and e-signature.	• Collect more beneficial information from the advisor at the point of Proposal and sale. • Minimize offline data collection and errors. • Eliminate the need to rekey information in other applications. • Reduce time to investing, thus billing on funds more efficiently and faster.

How to Get Started

Launch the next generation Proposal from your "Quick Actions" menu and click "Create a Proposal" or initiate the process from an existing client as you would with a legacy Proposal. Click around. Explore.

Support On Demand

If you need help, our Next Generation Proposal Help Center provides step-by-step instructions, from starting a proposal to funding it, and all things in between. It's accessible from every page of the Proposal using the icon in the bottom right-hand corner. Or, contact your Envestnet representative for more information.

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