ENVESTNET® Tamarac®

ADVISOR® Xi

Advisor CRM® and Advisor View™ with Schwab OpenView Gateway®

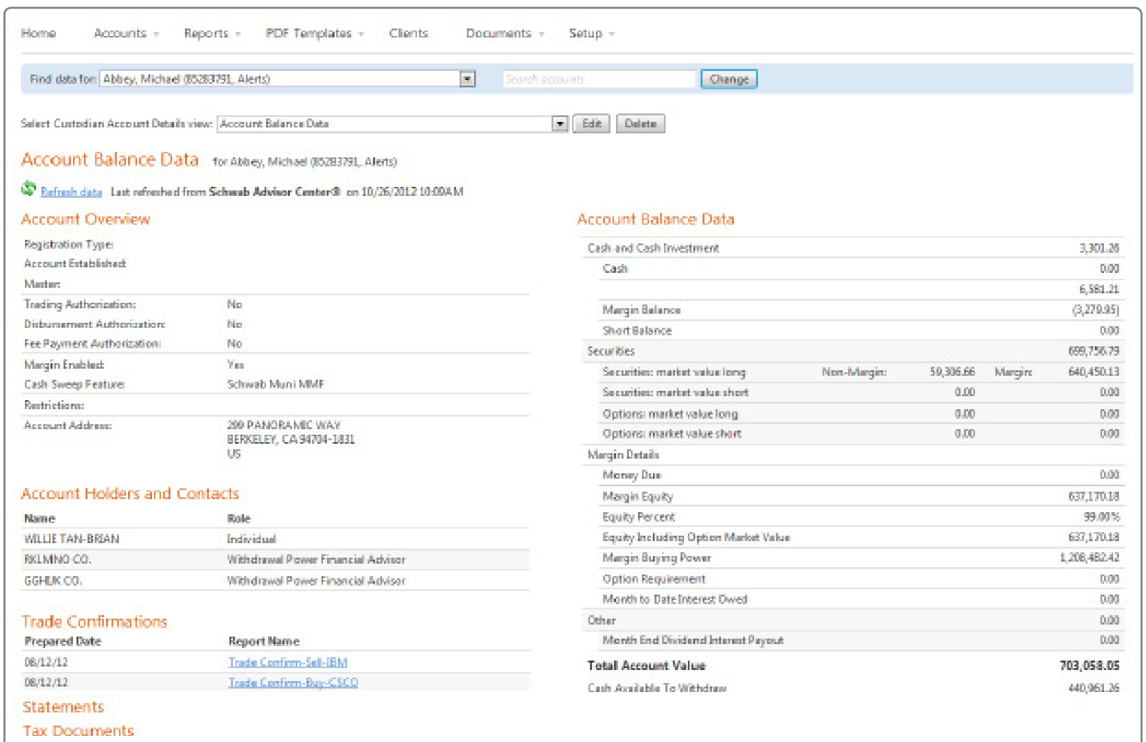
Provide your clients with a higher level of service while driving greater efficiencies within your business.

Envestnet | Tamarac collaborated with Schwab Intelligent Technologies™ to develop meaningful integration of critical client data from Schwab Advisor Center® within Tamarac's integrated RIA platform, Advisor® Xi.

Securely access custodial data in real-time from Tamarac's performance reporting and billing application, Advisor View, and the client relationship management system, Advisor CRM.

Real-time client data includes:

- Account Overview
- Account contact information
- Balance data
- Trade confirmation
- Statements
- Tax documents

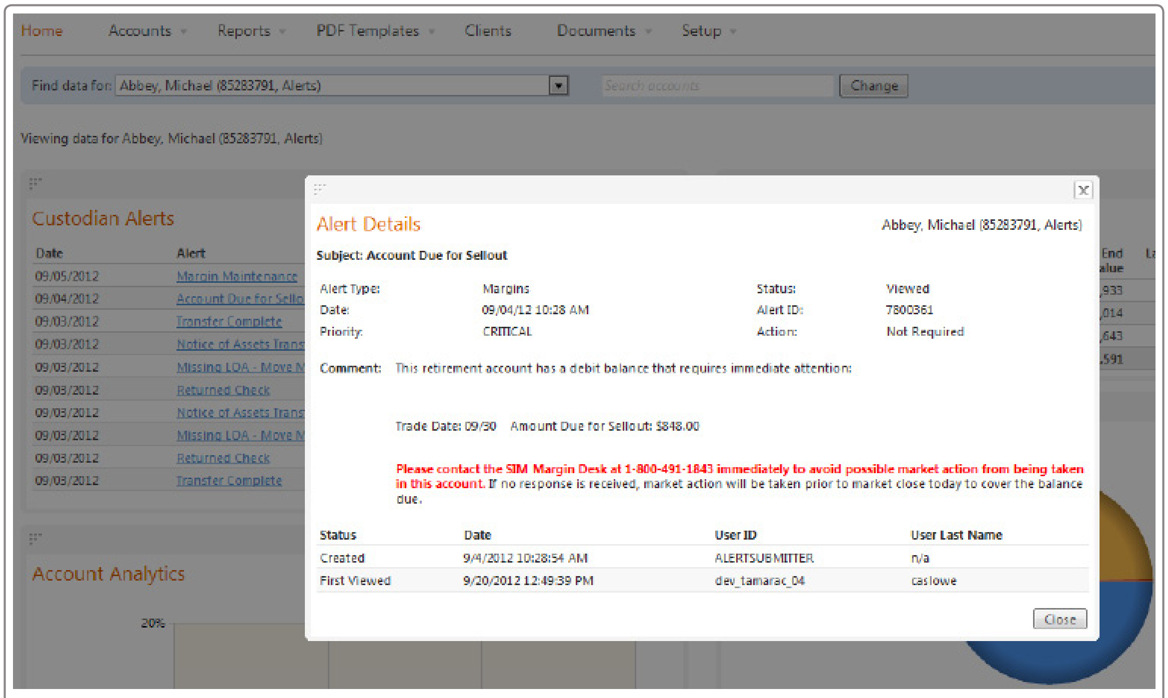


Screen shot: Integrated custodial data in Tamarac Advisor View

Utilizing this integration, advisors will be able to serve their clients from an integrated system with a single sign-on, driving greater efficiencies while improving responsiveness.

Alerts

Alerts are accessible in real-time from within the dashboard (below) and detail reports of Advisor View, as well as from Advisor CRM.



Screen shot: Alert details from Advisor View dashboard

> Envestnet | Tamarac is truly making account administration more efficient with this integration and our client service and operations teams couldn't be more pleased," said Troy Waters, Managing Director, HoyleCohen. "With access to real-time account data, alerts and electronic statements at our fingertips, our advisors have the information they need, without having to leave their current applications used for regular client management or portfolio management business processes.

*Schwab Intelligent Integration ("SII") is an integrated technology strategy. Solutions leveraging SII are offered by Schwab Performance Technologies® ("SPT") and by participating providers in the Schwab OpenView Gateway™, a service of Schwab Intelligent Technologies™ ("SIT").