Integration with Envestnet | Tamarac

Wealth management firms using Envestnet | Tamarac or Envestnet benefit from a seamless integration with Max, the industry-leading cash management solution.

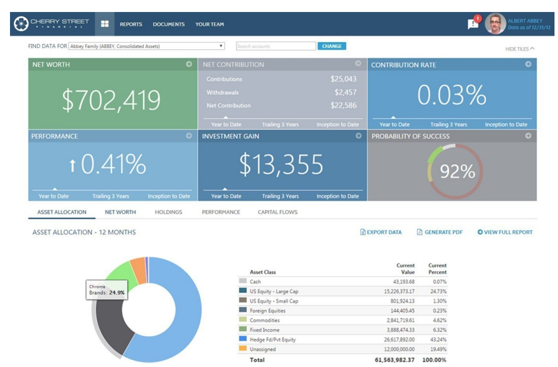
Integration Benefits

Clients appreciate Max's industry-leading cash management solution, allowing them to access preferred rates on held-away cash, obtain broader FDIC coverage, and benefit from other features such as consolidated tax reporting.

Advisors appreciate how Max helps them deliver market-leading rates on cash from leading online savings accounts while gaining visibility into held-away assets to support broader goals-based planning and AUM growth.

Advisors and client service teams can now easily bring a client's Max balances into both Tamarac or Envestnet without any action required by the client, enabling seamless reporting on any portals you use.

How It Works



To enable the data integration with Tamarac or Envestnet:

1. Send an email to advisors@maxmyinterest.com to ask the Max operations team to set up your data feed.

   You will need to provide the Super Branch code, your Firm's Name, and a contact name for the request.

2. Max sure you have registered for a Max Advisor Dashboard.

   Don't have a Max Advisor Dashboard account? You can register for free in 1-2 minutes at MaxForAdvisors.com

3. Send an email to the relevant contact for the platform you use:

   Envestnet: Contact UMP/ENV Service team
   Tamarac: Contact Tamarac Service team using mailgroup TamaracSupport@Envestnet.com

Questions? Need Help?

If you you need support, contact your administrator for Tamarac or Envestnet.

For questions about Max, contact advisors@maxmyinterest.com for general questions or use the Contact Us page: MaxMyInterest.com/Contact-Us for client-specific questions.