BYALLACCOUNTS® • GUIDE

More Data Connectivity with (a Lot) Less Work

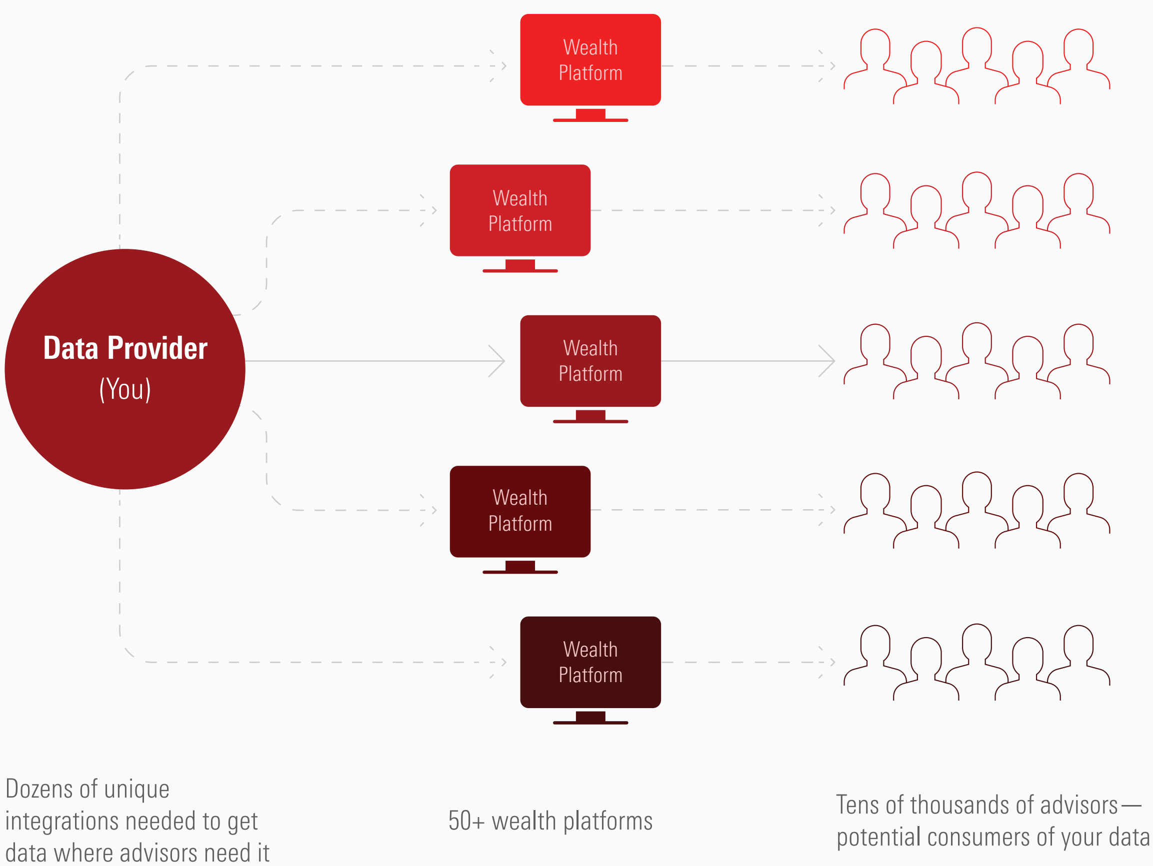
How to get data feeds set up faster and more easily—so your customers can get the information they need for performance reporting.

Your customers expect immediate access to financial data within their preferred reporting platforms. But establishing individual connections to each data source within the large (and growing) network of wealth reporting platforms can be incredibly time-consuming, frustrating, and expensive.

Here are just a few of the roadblocks you may face:

- **You may need dozens of integrations.** The sheer number of integrations required to connect with the various wealth platforms and applications is staggering, the task can quickly overwhelm your available resources.
- **Their requirements are varied and constantly changing.** Each of the dozens of wealth platforms and wealthtech apps may have their own unique requirements and processes for data integration—limiting your ability to establish a consistent, efficient approach across all data sources.
- **Your needs aren't their priority.** The platforms themselves may not consider your direct integration a priority, so you're at the mercy of their timeline and roadmap. You may also struggle for support from these platforms if you encounter issues.
- **The job is never done.** New wealth platforms and apps are constantly being launched. So the job of establishing connections to data sources is never really done.

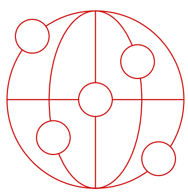
Far from being simply frustrating, the lengthy process of establishing these connections can have significant and lasting impacts on your business. At best, it takes up resources needed for more mission-critical work. At worst, it can significantly delay your time to market, alienate your customers and other users, and give your competitors an opportunity to outpace you in the market.



One Partner. A Wealth of Connections.

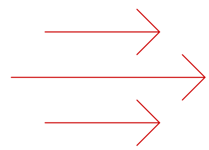
If your organization doesn't want to take on the hassle, expense, and time involved in setting up multiple individual connections, there is an alternative—a data feed integration service. This is a partner that's already done the heavy lifting of setting up connections with wealth platforms, advisors, and many others—so you can get all the data your customers demand in a single integration.

Leveraging existing technology that's already connected to your customers and wealth platforms can help you achieve:



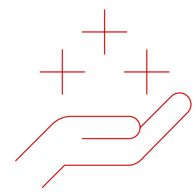
An Efficient Network Effect

Reach all your existing advisors, expand your addressable market, and improve customer acquisition.



Increased Speed to Market

Hit the ground running with pre-existing data integrations.



Better Use of Your Resources

Reduce opportunity costs associated with data distribution so you can focus resources on other key business needs.

What to Look For in a Data Integration Partner

When choosing a data integration partner, look for an organization that offers in-depth expertise in the wealth management space—with long-standing integrations. This partner should have existing connections to all types of data providers and all types of financial data.

Experience connecting to all types of data providers

- Traditional Custodians
- Brokerages
- Alternative Asset Custodians
- Annuities
- TAMPs
- Crypto TAMPs

Connections to all types of financial data

- Investment (brokerage, retirement, 529 plans, etc.)
- Insurance (annuity, permanent life)
- Banking (checking, savings, etc.)
- Liabilities (credit cards, mortgages, loans)
- Cryptocurrencies
- Alternative Investments

ByAllAccounts for Wealth Management Data Integration

ByAllAccounts® Data Integration Service connects your data to the largest network of technology platforms in the U.S. wealth management industry. Through a single connection with ByAllAccounts, you get access to a vast network of redistributors, platforms, and advisors.

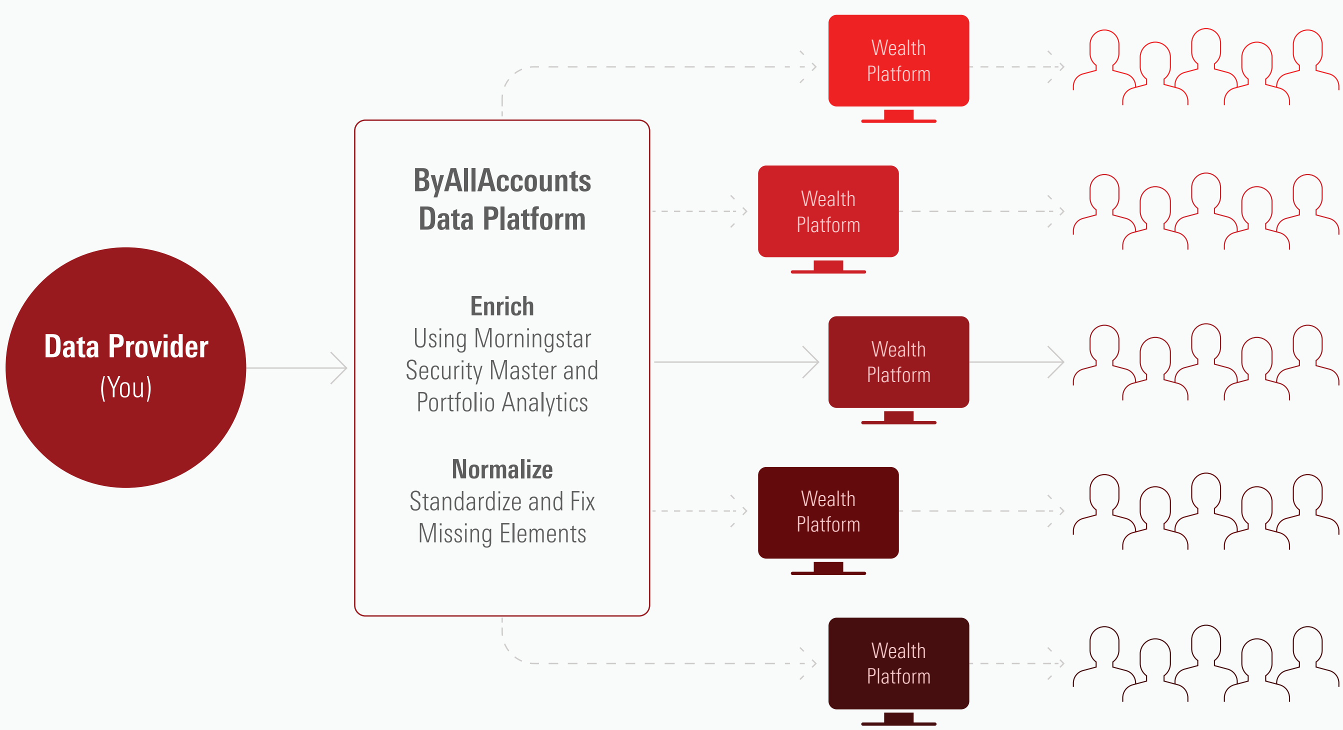
ByAllAccounts data integration removes many of the hurdles involved with onboarding new customers—eliminating the need to establish and manage multiple feeds while ensuring that your data has the greatest reach.

ByAllAccounts offers exclusive access to the deepest, broadest network available:

70+
Redistributors

50+
Platform Integrations

16,000+
Advisors Using ByAllAccounts



Single integration with ByAllAccounts gets your data into the hands of advisors

ByAllAccounts supports integration with the leading platforms in wealth management and enriches data to be reconciliation-ready for performance reporting

50+ wealth platforms

Tens of thousands of advisors—potential consumers of your data

We Steer and Simplify the Process

As an industry leader in data integration, we know how to make the process efficient, effective, and easy for our clients. We'll provide extensive guidance and support at all stages of your integration, including:

Planning

Development and Testing

Data Validation

Ongoing Quality Assurance

Industry-leading Expertise for Hassle-free Connections

Save time, resources, and hassle. ByAllAccounts connects your data to the largest network of wealth technology platforms in the U.S. wealth management industry. Through a single point of integration, you can go live quickly—and at a reasonable cost—to access a wealth of the connections your customers need.

Contact Your Local Sales Representative

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