

BYALLACCOUNTS • PRODUCT SHEET

Data Integration Service for Data Providers

Accelerate Speed to Market While Reducing Your Data Distribution Costs

Your advisor customers expect access to their book of business data within the reporting platforms they use daily. This requires a significant investment of time and resources on your part to establish direct integrations across the large network of wealth reporting platforms used by your customers. And because the platforms themselves may not consider your direct integration a priority, you're beholden to their timeline and roadmap. In order to stay a step ahead on innovation, you need to deliver data in modern and efficient forms rather than relying on legacy file delivery methods.

ByAllAccounts Data Integration is a streamlined service that connects your data to the largest network of technology platforms in the U.S. wealth management industry. Through a single point of integration, you can go live quickly and at a reduced cost to reach a wide network of your customers. By joining the ByAllAccounts Data Network, receiving data customers (wealth platforms and advisors that hold assets with your firm) will benefit from preferential/discounted pricing, applicable only to accounts sourced through our data integration partners.

Unlock Access to a Broad and Deep Network of WealthTech Platforms and Advisors

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

- 70+ redistributors
- 50+ platform integrations
- 16,000+ advisors using ByAllAccounts

The ByAllAccounts Data Integration Service gives you:

An efficient network effect

Our coverage includes our exceptional distribution network used by the majority of advisors and other financial professionals, reaching all your existing advisors, expanding your addressable market, and improving customer acquisition.

Increased speed to market

Quickly reach customers through ByAllAccounts' pre-existing data integrations.

Cost-effective approach to solve financial data distribution challenges

Reduce opportunity costs associated with data distribution, so you're able to focus your resources on other key business needs. Streamline efforts with a single format of integration with ByAllAccounts, who manages distribution to receiving platforms. Your customers will also get to benefit from preferential discounted per account pricing.




- All Types of Financial Data
- From traditional retirement products to digital assets, ByAllAccounts connects to a wide variety of financial data including but not limited to:
 - Investment (brokerage, retirement, 529 plans, etc.)
 - Insurance (annuity, permanent life)
 - Banking (checking, savings, etc.)
 - Liabilities (credit cards, mortgages, loans)
 - Cryptocurrencies
 - Alternative investments

Dedicated Support for Your Success

Our Custodial Operations and Data Analyst teams are experts at preparing your data for our platform integrations. You'll work with them to establish a scalable model for data access and collection, and they'll help ensure that your high-quality data is preserved and adapted for our downstream data consumer platform integrations.

We'll also promote your data connections and your company to our customer network in our quarterly newsletter.

Contact Your Local Sales Representative

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