

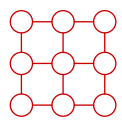
BYALLACCOUNTS® • PRODUCT SHEET

Data Integration Service for Data Providers



Accelerate Speed to Market While Reducing Your Data Distribution Costs

Advisors expect the integration of their managed account data within the technology platforms they use daily. This requires a significant investment of time and resources on your part to establish direct integrations across the large (and ever growing) network of wealth technology platforms. And because these platforms may not consider your integration a priority, you're beholden to their timeline and road map. If you're looking to expand your reach within the RIA market and integrate with top platforms, this can be challenging and time-consuming.

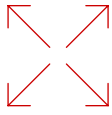


Harness a Proven Network

ByAllAccounts boasts integrations with key platforms critical to RIAs, offering unmatched access to over 80% of the RIA market. Our established network enables quick and seamless connections, saving you time and resources. Instead of dedicating countless hours and resources to building connections one by one, you can leverage our network and make us your data distribution arm.

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**



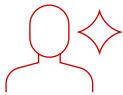
Seamless and Scalable Integration

Cut Through the Queue, Speed to Market: For newer custodians, getting in line for integrations can be slow and resource-intensive. We offer a shortcut, allowing you to bypass these delays and go straight to market.

Seamless Integration, Minimal Effort: No need for multiple touchpoints or lengthy setups—just plug in and start scaling. Streamline efforts with a single format of integration with ByAllAccounts, which manages last-mile data delivery to many platforms.

Cost-Effective Data Distribution: Reduce opportunity costs associated with data distribution, saving you months—if not years—of development time so you can focus on other key business priorities. Your customers will also benefit from preferential discounted per-account pricing as consumers of the data.

Enhanced Advisor Engagement: Advisors focus on investment products that they can monitor and manage within their existing platforms. Providing seamless access to data increases advisors' ability to actively manage the investment products within their client portfolios.



Dedicated Support for Your Success

Our commitment to your success goes beyond integration. ByAllAccounts provides custodial operations and data analyst teams to support your journey, offering expert preparation and adaptation of your data for seamless platform integration. ByAllAccounts acts as your Level 1 support across all data consumers.



Visibility Across the Industry


It's not just about the technology. Being part of our network means increased visibility through our quarterly newsletters, social media, and business reviews with top platforms. We help you spread the word and grow faster.



Unlock a Full Distribution Channel

By leveraging ByAllAccounts, you're not just integrating—you're unlocking a full distribution channel that places your business in front of the right platforms and advisors at the right time.

Contact Your Local Sales Representative

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