**Advisor Launch Email Series**

**Email 1**

Subject: Announcement—Data Aggregation Feature Coming Soon!

Target: Home Office to Advisors

Dear <<Trusted Advisor>>

We’re pleased to announce that ByAllAccounts®, the industry leader in financial data aggregation for investment use cases, will be launched as a new feature on the client portal. Data Aggregation from ByAllAccounts will help you deliver the next level of excellence when working with your investors. This service offers you a 360-degree view of each client’s portfolio, including held-away banking, brokerage, trust, 401(k) and pension assets, as well as REITs, variable annuities, and even offshore accounts. Having a 360-degree perspective allows you to create more personalized advice for your clients, therefore increasing the value you provide.

Key advisor benefits of ByAllAccounts include:

* Building strong relationships and providing personalized advice
* Growing assets under management and assets under advisement
* Determining your clients’ true asset allocations, including held-away assets
* Increasing efficiency through automated data collection and reporting

Key investor benefits of ByAllAccounts include:

* Viewing a complete picture of their net worth
* Receiving more actionable and personalized guidance
* Gauging progress toward financial health goals

Learn more about ByAllAccounts account linking functionality. Take the [self-guided training](https://www.morningstar.com/products/byallaccounts/training-resources) to learn how to use account aggregation today—and be prepared for the launch coming soon.

**Email 2**

Subject: Announcement—Data Aggregation Now Available for You & Your Clients!

Target: Home Office to Advisors

Dear <<Trusted Advisor>>

We’re pleased to announce that ByAllAccounts®, the industry leader in financial data aggregation for investment use cases, is now available in the client portal. Data Aggregation from ByAllAccounts will help you deliver the next level of excellence when working with your investors. This service offers you a 360-degree view of each client’s portfolio, including held-away banking, brokerage, trust, 401(k) and pension assets, as well as REITs, variable annuities, and even offshore accounts. Having a 360-degree perspective allows you to create more personalized advice for your clients, therefore increasing the value you provide.

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Please use the tools available to you and encourage your investors to start linking their accounts todays, including this overview document <<link to Investor One Sheeter>>.