

BYALLACCOUNTS®

# Make Data Your Differentiator

How to Grow and Scale your Wealthtech  
with the Right Aggregated Wealth Data and Tools

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Your wealthtech is poised for growth. But successfully scaling your business—while also outpacing your competition and exceeding the expectations of advisors and their clients—can be tough.

One factor lies at the heart of everything your wealthtech delivers: data.

High-quality, advisor and investor data aggregation—combined with the tools to easily distribute the data across your platform and analyze that data—can help your wealthtech:



#### **Grow at Scale**

Reach a broader market of advisors without compromising data performance, quality, or efficiency.



#### **Accelerate Innovation**

Increase speed to market, delivering solutions to support rapidly evolving advisor demands.



#### **Earn the Trust of Advisors**

Reinforce your wealthtech's reliability by providing accurate, timely, and comprehensive data.



#### **Boost Advisor Adoption**

Enhance advisor efficiency and encourage their reliance on your tools and services with easy access to quality data.



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## What to Look for in a Wealth Data Partner

Of course, not all wealth data aggregation and distribution partners can deliver on those opportunities. As you evaluate your options, look for a partner that excels in:

### **Deep and Broad Data Coverage—Tailored for Wealth Management**

The ideal partner should have established connections with a wide array of wealth data providers, including traditional custodians, brokerages, annuities, TAMPs, and alternative investment sources. They should also make it easy to access these data providers at both the advisor and client levels.

### **Impeccable, Wealth-Centered Data Expertise**

Consistently accurate, fit-for-purpose wealth data is a mission-critical need for any wealthtech. That's why choosing a provider whose products and services that are centered on wealth is crucial.

### **Easy Integration**

Your technology team has enough demands on their time, so look for a partner that can deliver data in a way that ensures a smooth integration—without the need for custom development.

### **Integrated Insights and Analytics**

Raw data is important, of course. But providing exceptional value to advisors and their clients requires the ability to enrich data with deep, wealth-focused insights—as well as advisor-friendly tools to easily assess and analyze the enriched data.

### **Scalability**

As your company grows, you need a wealth data network that can scale with it. This includes the proven capability to handle larger data volumes and growing user bases.



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## The Wealth Data Network That Makes the Difference: ByAllAccounts

ByAllAccounts delivers the edge wealthtechs need to grow, scale, and differentiate themselves from their competitors. It delivers exceptionally granular, highly enriched data with all the detail, customizations, and support your wealthtech needs. And because it's integrated with Morningstar, ByAllAccounts also lets you seamlessly leverage Morningstar's vast ecosystem of capabilities.

### Proven Track Record Supporting Fiduciaries

For more than two decades, ByAllAccounts has delivered T+1 data to the leading portfolio management platforms for mission-critical use cases. Advisors rely on our data to fulfill their fiduciary duties and provide holistic financial advice in the best interests of their clients.

### The Most Comprehensive Wealth Data Network

Unlike other aggregators, ByAllAccounts provides high-quality data that's specifically designed for wealth management—including advice engagement, performance reporting, portfolio analytics and rebalancing, financial planning, trade compliance management, and more.

Your wealthtech will benefit from:

- **Advisor book of business & custodial network.** Advisors will be able to access their complete books of business on your platform. You can earn their trust with accurate data from over 1,200 sources, such as recordkeepers, annuity providers, TAMPs, and ~ 200 custodial feeds. Whether you need to grow your existing network or are starting from scratch, ByAllAccounts can help you optimize your resources.
- **The broadest source coverage for held-away consumer/investor financial data.** ByAllAccounts delivers the most comprehensive financial data from more than 15,000 sources—including cash, investments, credit, loans, cryptoassets, and mortgages. Our long-tail approach also includes an industry-leading number of 529 and retirement plan providers.
- **Highest-quality investment data enrichment.** Investment data often includes missing or ambiguous data points. Building on decades of experience serving the wealth space, ByAllAccounts combines proprietary tools to normalize and enrich the data—so it can be used for advanced investment reporting needs.
- **Direct data connections for data reliability.** Approximately 80% of our aggregation is sourced from direct connections, including open banking and custodial feeds.

## Uniquely Morningstar Data and Insights

With ByAllAccounts' financial data aggregation and enrichment engine, you can unlock turnkey access to Morningstar's vast data and portfolio insights, including:

- **Morningstar Security Master.** ByAllAccounts data aggregation appends data with internal Morningstar IDs, in addition to ticker symbol and CUSIP—giving you even more opportunities for advanced investment industry data and analysis.
- **Premium Portfolio Analytics.** Easily and cost-effectively enrich aggregated investment holdings with fund and equity attributes—sourced from Morningstar Licensed Data.
- **Seamless data integration across the entire Morningstar ecosystem.** Streamline your vendor relationship and access highly specialized, investment-focused research, expertise, and analysis tools.

## Seamless Integration and Adaptability

Designed to make integration seamless, our specialized tooling prepares data in a way that eliminates the need for custom development and reduces the need for manual data-preparation—whether you choose an off-the-shelf integration or an advanced configuration to further adapt the data output.

We'll further adapt activity to the requirements of your platform—without disrupting your customers—by establishing a data validation feedback loop with you. This includes modifying transaction types or subtypes at an institution level or globally, as well as optionally synthesizing multiple transactions into a single representation or filtering out a certain type of transaction from the data output.

## Dev Tools and Support

Get up and running quickly with ByAllAccounts [dev tools](#)—including easy-to-follow documentation, quick-start guides, and sample code. You'll also receive professional service support, including guided implementation with a team of experts. The team will provide project management, solutioning, and best practices to ensure efficient service integration. You'll also receive ongoing support for technical issues and data access questions.

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## Learn More

Make data your differentiator — so you can grow at scale, delight your users, and outpace your competitors. Contact ByAllAccounts today.

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## Contact Your Local Sales Representative

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