

BYALLACCOUNTS® • PRODUCT SHEET

Custodial Feed Data Bundle— Cost-Effectively Expand Your Coverage

The investment landscape is evolving, and registered investment advisors (RIAs) are expanding their custodial relationships to serve growing client needs. The more assets an RIA manages, the more custodial relationships they tend to have, according to Cerulli Associates.

Wealthtech platforms face a critical challenge: to provide the access and flexibility advisors require, they need to build and manage dozens of custodial integrations. Each new connection typically takes three months of development, often longer when dealing with data formats, delivery protocols, and other hurdles. Building custodian integrations is not a core business for wealthtechs, and it shouldn't have to be.

The ByAllAccounts Solution

The ByAllAccounts Custodial Feed Data Bundle offers immediate access to approximately 200 direct custodial feeds ready to go, out of the box.

Our Solution Allows You To:

- Expand custodial coverage exponentially through a single connection.
- Redirect engineering and operational resources to core business.
- Scale custodial data access cost-effectively.
- Eliminate integration maintenance overhead.

Beyond Standard Coverage

Beyond the standard Custodial Feed Data Bundle, ByAllAccounts offers premium products, including:

Turnkey Tax Lot Data: Our Tax Lot Data capability provides comprehensive open and closed tax lots to support more advanced reporting and direct indexing.

Custom Build Service: Need a feed we don't have? Our Custom Feed Build service enables you to have custom feeds built at your direction. The service includes dedicated project management to ensure seamless execution.

Delivering Strategic Benefits

Instead of slow, incremental progress toward full custodial integrations, partnering with ByAllAccounts delivers immediate benefits that include:

- Ready to Go, Out of the Box: ~200 direct custodial feeds.
- Simplified Advisor Onboarding: Streamlined instructions to get your advisors up and running quickly.
- Flexible Authorization Options: Support for advisor, enterprise, and subadvisor authorization.
- Significant Cost Savings: Preferential pricing on direct feed accounts.

Unmatched in the Industry

By delivering ready-to-connect feeds, ByAllAccounts can help wealthtech platforms of all sizes offer a robust set of custodial feeds. Our direct custodial feed network—carefully built and curated over 25 years—and our detailed, enriched, fit-for-purpose data are unmatched in the industry.

Contact Your Local Sales Representative

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