



## NEWS

**Contact:** Leslie Swid  
Impact Communications  
(913) 649-5009  
[leslieswid@impactcommunications.org](mailto:leslieswid@impactcommunications.org)

# **ByAllAccounts and Portfolio Pathway Partner to Provide a Unified Account Data View**

## ***Aggregated Data Stream Enables Advisors to Offer Holistic Wealth Management***

BOSTON -- May 4, 2012 – [ByAllAccounts](#), the leader in account aggregation, and [Portfolio Pathway](#), a portfolio management software solution company, today announced a partnership to provide Portfolio Pathway users with aggregated client data from thousands of financial institutions, across all their accounts. This unified view will enhance advisors' ability to provide wealth management advice based on all of their clients' assets, including variable annuities, brokerages, ETFs, trusts, retirement accounts, and more. This addition to ByAllAccounts' growing list of partnerships further expands their ability to provide aggregated data to wealth management professionals.

The partnership combines daily client balance, holding, and transactional information through ByAllAccounts with the portfolio reporting capabilities of Portfolio Pathway. Using this combined solution financial advisors can help their clients better manage risk and achieve their personal financial goals.

Registered investment advisor David Gratke, of Gratke Wealth in Portland, Ore., has been using the ByAllAccounts account aggregation service with Portfolio Pathway. "For the first time, I have been able to provide truly holistic advice for my clients by using this solution," said Gratke. "It has even allowed me to work with pre-retiree clients, providing - and billing for - advice on 401(k)s. This has meant better service for my clients and improved profitability for my business."

Portfolio Pathway serves registered investment advisors, TAMPs and Broker Dealers. “Our users want to be sure that they have access to the data they need to serve their clients,” said Dave Miller, CEO of Portfolio Pathway. “Through this alliance with ByAllAccounts, we can provide extensive reporting to our advisors giving them the ability to manage their clients overall assets and allowing them to be compensated for that level of service.”

“In this post 2008 era, investors want to be better informed and more involved in their financial decision making,” said ByAllAccounts’ President and CEO James Carney. “Portfolio Pathway is addressing this need by providing a unified view of assets across a household, enabling their advisors to help clients make more informed decisions about preserving or growing their wealth.”

For a full list of ByAllAccounts’ portfolio management and reporting systems integration, view its [partner listing](#).

#### **About ByAllAccounts, Inc.**

ByAllAccounts, the financial advisors’ choice for account aggregation since 1999, is a service that retrieves, enriches and consolidates reconciliation-ready account data from any custodian. ByAllAccounts’ patented aggregation engine, through which hundreds of billions in assets flow daily, aggregates all client account data — from any source — within an advisor’s wealth management platform or trust accounting system for a truly comprehensive view. Thousands of advisors rely on ByAllAccounts to save administrative time and costs, mitigate risk associated with having incomplete information and grow revenues through client referrals and new business development. ByAllAccounts integrates seamlessly with all of the most popular wealth management platforms and compliance software solutions. For more information, visit [www.byallaccounts.com](http://www.byallaccounts.com).

#### **About Portfolio Pathway**

Portfolio Pathway is a leading provider of web-based portfolio management reporting and back office tools for financial advisors, wealth managers, TAMPs and broker dealers. This next generation system encompasses performance reporting, account aggregation, a flexible billing and payout module, composite reporting, portfolio modeling and a branded client portal. For more information, visit [www.portfoliopathway.com](http://www.portfoliopathway.com).

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