

# The Best of Aggregation:

A Collection of Data Aggregation whitepapers, webinar replays, and videos

*86% of financial professionals say reporting on all a clients' assets is Extremely/Very important, up from 72% in 2010\**



\*ByAllAccounts National Survey: Trends in Holistic Wealth Management, June 2013

## Discover how Data Aggregation technology can benefit your firm:

1. Spend less time on manual data entry and more time servicing clients.
2. Increase revenue generation.
3. Get a holistic view of your clients' financial holdings.

### What Does Data Aggregation Mean for You?

16% of advisors who use aggregation to gather and report



on held-away data have an Extremely Efficient back office. With data aggregation your operations team will spend less time doing manual data entry and more time on value-added business. Learn how to provide better service to your clients by scaling your business efficiently.

*Watch a 3-minute video to see how it works."*

### Give Your Clients Peace of Mind

Risk is inevitable. Your job is to help your clients determine their optimal risk-to-reward ratio. ByAllAccounts helps more than 1,500 advisory firms exceed client expectations and deliver peace of mind knowing that you are monitoring their entire portfolio 24/7.



*Download the Webinar Replay to see how we help other clients*

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## The ByAllAccounts' Aggregation Advantage

“It is important to look for a flexible, intelligent data aggregation solution that can not only collect data from nearly any source, but also automatically normalize, enhance, and import data for use in any target system.” – Duncan Wheatley, Managing Director, Watson Wheatley Financial Systems.



*[Download the Whitepaper on aggregation for asset reconciliation](#)*

## Increase Revenue with Data Aggregation

“We were able to take over assets we hadn't been managing because of account aggregation technology.” – Kent Fitzpatrick, AIFA, ARPC, Managing Director, Asset Strategy Consultants.



*[Read advisor success stories in the e-Book](#)*

### Let us suggest the following next steps:

1. [See a list of systems we are integrated with](#)
2. [Search our list of 4,300+ data sources](#)
3. [Schedule a time to speak with us](#)

## About ByAllAccounts

ByAllAccounts is the only provider of intelligent data aggregation for financial services companies and the platforms on which their businesses depend. Their patented, intelligent data aggregation system implements a knowledge-based process that uses artificial intelligence to gather and transform financial account data and deliver it to portfolio management, reconciliation, compliance, trust accounting and performance systems.

*For some of your clients, having an accurate picture of their financial accounts (e.g., 401k plans and life insurance policies) involves manually entering data from statements. What if we could automate data collection for these assets so that you could reduce manual data entry?*

The financial industry's most reputable advisory firms, financial institutions, and financial technology vendors rely on ByAllAccounts as their primary connector to structured and unstructured financial account data, enabling them to streamline their third-party relationships and to empower their applications and services. For more information, visit [www.byallaccounts.com](http://www.byallaccounts.com)

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