

“Create an Exceptional Client Experience”

*86% of Advisors say “Client Satisfaction” is their most important measure of business success**

Discover how advisors create an exceptional client experience by:

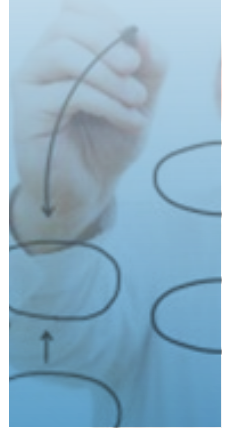
- Spending more time with clients by creating a highly efficient back office
- Providing clients with a holistic view of their financial portfolio

*ByAllAccounts Survey of Successful Financial Advisors, Q2 2013

Advisors spending more time with clients and not in the back office

In a 2013 survey, 25% of highly successful advisors reported an “extremely efficient” back office, more than 2X compared to all advisors.

Download an Executive Summary of the Survey Traits of Successful Advisors

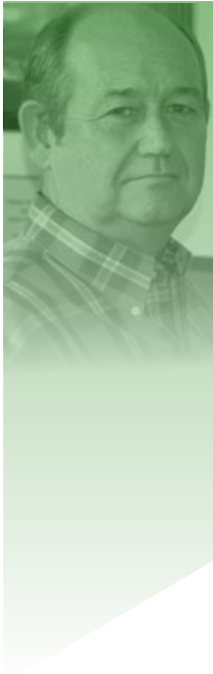


Operational efficiency equals more face-to-face time with clients

Keeping clients highly satisfied by streamlining operations and spending more face-to-face time has enabled me to get more referrals and boost AUM by about 40% since the beginning of the year.”

- Michael Andries, MBA, CFP®, CMC® Managing Member and sole proprietor, mABC LLC Investment Advisors

Learn More: mABC Case Study

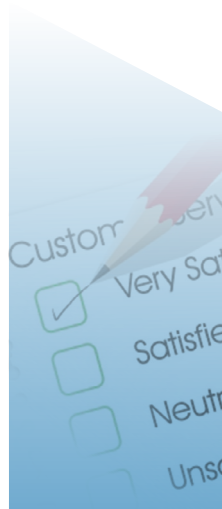
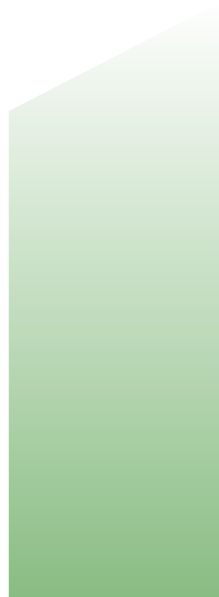


Providing clients with a holistic view of assets leads to referrals, client retention, and loyalty 🏹

Almost **46%** of Investors found their advisors through a referral from a friend, respected associate, CPA or attorney, according to a survey conducted in conjunction with Paladin Registry.

According to this survey, clients who get a holistic view were more likely to: give their advisor a referral, have a higher satisfaction rating, and be more loyal.

[Download copy of Survey](#)



Advisors provide clients with holistic advice as efficiently as possible 🏹

“When we talk about providing holistic advice, account aggregation is a critical piece to making this possible. You cannot truly manage an entire portfolio without having access to all of the pieces of financial information.”

- Liz Goodrow, Senior Client Care Associate, SignatureFD

Learn More from Liz about Client Retention, Satisfaction, and Loyalty



About ByAllAccounts

ByAllAccounts formerly owned by State Street Corporation, has been in business since 1999.

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?

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. 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

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