

The Best of Educational Content for RIAs

A collection of case studies, webinars, and whitepapers on how to grow your independent advisory practice

*86% of financial advisors rated client satisfaction as the best indicator for business success in both, 2012 and 2013.**



*ByAllAccounts National Survey: Traits of Successful Financial Advisors, June 2013

Investment Approach: Take a Holistic View

“You need an aggregate view of a client’s assets in order to give them an appropriate plan for their liquid investments. You cannot rebalance properly and report on the overall performance of their portfolio without a complete view of their liquid assets.” - Casey J. Bear, JD, CFP® CEO



See how this RIA firm approached \$350 in AUM with a 5 person staff

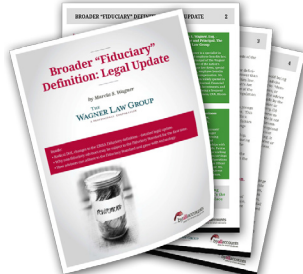


Adhere to the Fiduciary Standard

Investors want to know that their financial advisor is focused on helping them meet their long-term goals without any conflicts of interest. That’s the promise that fiduciary advisors deliver — they have the legal duty to place their clients’ best interests before their own.



Get the full legal update here from Marcia S. Wagner, Founder and Principal The Wagner Law Group



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Understand Your Clients' Needs

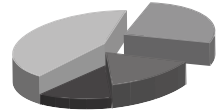
In a study of more than 400 financial professionals, advisors said “Client Satisfaction” is their most important measure of business success. Therefore, in this study ‘Highly Successful Advisors’ were defined as having “Extremely Satisfied” clients, 20% of all respondents. These “Highly Successful Advisors” were better at Understanding Client Needs than their peers.



Discover more traits of Highly Successful advisors and see how you stack up

Effectively communicate the importance of aggregation to clients Providing Holistic Advice to Clients

73% of investors said their advisor helps them select the asset mix for their investment portfolios. 43% said they look for a consolidated statement of their assets when selecting a financial advisor.



Watch this webinar replay and learn how to speak with clients about using aggregation to report on outside assets

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

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