

Attract and Retain Top Producers with Account Aggregation

Access to innovative financial technology is now a key requirement for advisors and a critical point of differentiation for broker-dealers.

Given today's increasingly complex and evolving market, today's advisors expect more from their broker-dealer, including value-added technology, services and practice management support.

In order to attract and support top producers and gain a competitive advantage, today's most innovative broker-dealers are investing in account aggregation technology.

With account aggregation, advisors not only benefit from the support of a firm committed to their success—they also enjoy an unprecedented level of portfolio insight, enabling them to increase client engagement, raise the value of their advice and achieve greater levels of success.

Investing in Insight for Advisor Success

Building Client Engagement

Each investor expects to receive advice that is tailored to their personal financial goals. Yet many advisors, hindered by a manual, paper-based process, lack the reliable information they need to uncover held-away assets and understand how they're performing.

Account aggregation answers this challenge by seamlessly delivering an investor's entire financial picture. Advisors can offer fully informed advice, leading to increased investor confidence and a more interactive client-advisor relationship.

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Fact: The need for account aggregation is urgent. In a recent survey of more than 350 financial advisors, 95% said clients regularly ask for help with self-directed retirement accounts.

Capturing New Assets

What advisor wouldn't embrace the opportunity to move more assets under management or charge for advice they provide on held-away accounts?

By providing account aggregation services that deliver a comprehensive, real-time portfolio view of all held-away accounts, broker-dealers are helping to enhance the value of advisors' advice. This paves the way for advisors to capture new assets and adopt a fee-based model.

Increasing Efficiency

Account aggregation saves advisors substantial amounts of time and money. By automating the aggregation process, advisors can focus on high-value client development. By offering a high-performance tool, broker-dealers attract top producers.

ABOUT ALLDATA ADVISOR®

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AllData Advisor is the industry's leading account aggregation service. Delivering data from more than 12,000 sources, AllData Advisor creates a comprehensive view of client portfolios and provides greater client insight to broker-dealers and advisors. With this insight, advisors are more effective at establishing trusted relationships and bringing in more assets. For more information, visit www.AllDataAdvisor.com.

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