

BYALLACCOUNTS • SOLUTION BRIEF

Outsourced Custodial Feed Network

Get fast access to custodial feeds — and start saying “yes” to advisors — with our outsourced custodial feed network

For leaders of growing wealthtech platforms, offering advisors the same data integrations as long-established competitors can seem like a nearly impossible task. After all, many of these competitors have been building their custodial integrations for years.

Catching up with them could take an almost unattainable amount of time and development resources — costing up-and-coming platforms precious time and money in the race to onboard new advisors, grow assets, and boost profits.

Fortunately, there’s an easy, fast, and cost-effective way for wealthtech platforms to leapfrog their competition — and ensure the highest-quality data in the process. With ByAllAccounts.

The Long (Manual) Road to Full Custodial Integrations

Most registered investment advisors (RIAs) work with more than one custodian. In fact, the more assets an RIA manages, the more custodial relationships they tend to have, according to research from Cerulli Associates.

Seventy-one percent of RIAs with three or more custodians, for example, manage \$500 million or more in assets.¹

To provide the access and flexibility these advisors require, a wealthtech platform needs to establish dozens of custodial integrations. Each one can easily take three months to build from scratch. And that's if everything goes smoothly. In reality, complications with formats, delivery, and other hurdles can cause the process to drag on even longer.

The ByAllAccounts Custodial Feed Network

Outsourcing custodial integrations to ByAllAccounts can save years of work—providing access to **dozens of integrations in just weeks**.

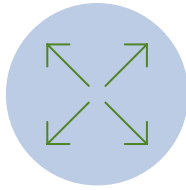
ByAllAccounts delivers:

- **A one-stop shop** for advisors' book of business data
- **~200 direct custodial feeds** from top wealth institutions
- **Preferential pricing** on direct-feed accounts
- Access to **1,500 professional-only data sources** for long-tail coverage
- Multi-persona support to ensure **great user experiences for advisors, delegates, back office users and investors**
- **Mature onboarding process for advisors** to make their data available via our feed network—removing friction and providing a better user experience
- **Data enrichment** that's wealth-specific and enables reconciliation-ready data
- The ability to establish **additional direct feeds as needed**

¹ "A Quarter of RIAs May Add a New Custodian in Next Year," WealthManagement.com, Feb. 8, 2023.

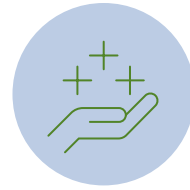
Immediate Benefits

Instead of slow, incremental progress toward full custodial integrations, partnering with ByAllAccounts delivers immediate benefits.



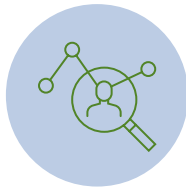
Expand Your Market Reach

Instantly unlock market segments currently out of reach.



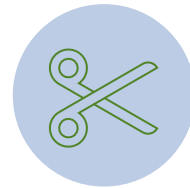
Free Up Your Resources

Redirect resources for further growth, innovation and differentiation.



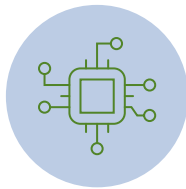
Delight Advisors

Our advisor-specific user experience simplifies and streamlines data onboarding.



Cut Costs

Enjoy reduced operational costs through our preferential pricing and single point of integration.



Scale for Growth

Our extensive network of data sources is ready to grow with you.


A Smooth, Established Process


ByAllAccounts is currently integrated with over 50 wealth platforms and more than 70 technology redistribution partners. So we know how to make the process easy and fast for wealthtech providers and advisors.

We use our thoroughly documented process to walk you through setup. And once you're up and running with us, you can set it and forget it—knowing that we handle the maintenance of connections with financial institutions to ensure data access and integrity.

Start Saying “Yes” to Advisors

Welcome new advisors with confidence by outsourcing your custodial feed network to ByAllAccounts. Contact the Morningstar ByAllAccounts sales team to learn more or request a demo.

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 morningstar.com/products/byallaccounts