

BYALLACCOUNTS • PRODUCT SHEET

Financial Data Aggregation of Cryptoassets

Today, access to cryptoasset data is fragmented, and data sources may be unreliable. Crypto is a complex and rapidly evolving new asset class. The lack of visibility into cryptoassets keeps advisors from providing truly holistic and personalized advice to their clients.

ByAllAccounts provides client aggregation of cryptoassets to allow advisors to deliver holistic financial advice and enable performance reporting.

Through these premium data connections, advisors can invite their clients to securely aggregate their cryptoassets from top exchanges to gain read-only access to end-client information. Users of **Coinbase Exchange** will have the ability to aggregate their cryptocurrency wallets directly through our network. The service will continue to grow and add new exchanges over time. Cryptoasset data can be delivered via nightly files each day or through real-time API (Application Programming Interface) connectivity.

These connections leverage OAuth as a means of authentication, eliminating the need for ByAllAccounts to use the users' login credentials. Leveraging OAuth also results in quicker aggregations and less disruption and downtime to the aggregated accounts.

With access to this data, wealth management firms and their advisors will have more visibility into held-away cryptoassets, with the ability to:

- View assets held on exchanges and custodial platforms
- Reconcile custodial and non-custodial data into a single data set
- View all transactions and transfers made by individual wallets
- Understand cryptoassets for tax planning and reporting
- Know location of cryptoassets to assess the exchange or wallet risk; liquidity data on how long positions may be locked (i.e., staking)
- Create estate plans for holdings either at centralized exchanges or onchain
- Leverage data as an Internal compliance tool at the firm level.

The Benefits of Using ByAllAccounts

Wealthtechs/Enterprise Home Office

- Visibility into investors' cryptoassets
- Enable a superior user experience
- Streamline back-office/internal compliance efficiencies

Advisors

- Visibility into clients' cryptoassets for financial and tax planning
- Build strong relationships and provide personalized advice
- Increase efficiency through automated data collection

Investors

- View a complete financial picture and net worth including cryptoassets
- Receive more actionable and personalized guidance

Contact Your Local Sales Representative



+1 (312) 384-4000



baa-sales@morningstar.com



morningstar.com/products/byallaccounts

Ready to make aggregated data your most valuable asset? See for yourself why ByAllAccounts delivers more accurate data for more informed financial investment decisions.