

# AllData Advisor: Gregory Bone Profile



## Gregory Bone Helps Advisors with ProEquities, Inc. Utilize Aggregation Technology to Gain a Competitive Edge

### Gregory Bone

Director of Technology Training, ProEquities, Inc.

### Challenge

Gregory Bone is the Director of Technology Training with ProEquities, Inc., a service and growth-oriented broker-dealer for over 1,400 independent registered representatives and financial advisors throughout the United States.

Greg understands that technology plays a large role in advisors' ability to best serve investors. He strives to provide his team with sophisticated, easy-to-use tools that will set them apart from their competitors, resulting in better client relationships and increased assets under management.

Several years ago, Greg noticed that an increasing number of advisors were interested in aggregation technology — specifically, its ability to offer a comprehensive picture of clients' assets. In addition, advisors were finding that investors were starting to ask about tools they could use to track the progress of their overall finances — a key feature of aggregation.

Greg notes, "As advisors and investors became more sophisticated, there was a rising expectation for an aggregation tool. We recognized that demand and sought a solution that would best fulfill the needs of all those involved."

### Solution

After researching the available options, ProEquities selected AllData Advisor as its aggregation technology of choice. Since implementing the solution and making it available to its advisors, AllData Advisor has become an increasingly popular tool that is heavily relied on by ProEquities advisors.

"Technology plays a large part in advisors' daily activity, and when used properly, it delivers a true competitive edge."



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**“CashEdge’s AllData Advisor is a great tool, supported by great customer service, that allows advisors to provide the most comprehensive service available to investors.”**

Greg supports advisors’ adoption and use of the technology by offering monthly and quarterly training sessions. Advisors can constantly learn new ways to utilize the technology available to them, as well as troubleshoot any issues.

Greg explains that AllData Advisor is very easy to implement and use. He says, “CashEdge has dedicated advisor consultants who are diligent in customer service, helping to organize and support training efforts. Ultimately, AllData Advisor is a quality product, supported by great service.”

## Results

The feedback Greg receives from advisors using AllData Advisor has been wholly positive. According to Greg, these advisors know that the comprehensive information it provides is critical to the success of their practice. In fact, based on the current success of advisors utilizing the tool, Greg has seen an increase in interest from other advisors who want to experience similar success.

“With AllData Advisor, advisors don’t need to be technology experts,” he explains. “I help them see the value of the tool and understand the creative solutions for using it so they can achieve the desired end result. But ultimately, the ease of use and success generated by AllData Advisor speaks for itself.”

Feedback from investors is also positive. They can see that their advisors are taking their entire financial picture into consideration when making recommendations and plans. Further, investors praise the technology for its simple setup process and ability to quickly receive downloads from financial institutions.

AllData Advisor is now a key part of the technology program at ProEquities. Greg explains, “Technology plays a large part in advisors’ daily activity, and when used properly, it delivers a true competitive edge. By providing advisors access to valuable technology like AllData Advisor, we are giving them an undeniable advantage.”

## 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](http://www.AllDataAdvisor.com).

AllData Advisor is a service of CashEdge, a division of Fiserv. For more information, visit [www.cashedge.com](http://www.cashedge.com).