

# ALLDATA® FOR PERSONAL FINANCIAL MANAGEMENT

## Personal Financial Account Aggregation



AllData® for Personal Financial Management (AllData) enables banks, other financial institutions and providers of other emerging applications to offer their customers a convenient mechanism to access an accurate, timely, comprehensive and secure view of their personal finances from a website or mobile technology application.

Built on industry-leading technology, AllData offers seamless integration with existing applications and user interfaces and delivers the most current and highest quality data available from more than 10,000 sources, allowing your customers to manage and track all their finances from your proprietary technology application.

### Key Features

**The Widest and Deepest Coverage Available** – Provides easy consolidation of account information, including banking, investment, retirement, insurance, credit card, mortgage, loans and bill information, as well as hard-to-access assets, such as life insurance, annuities and REITs.

**Unmatched Security** – Leverages the same technology that is used by the world's leading financial institutions to safeguard internet banking portals, so providers and consumers can be sure their data is protected.

**Industry-Leading Data Normalization** – Maps data to a common format, allowing data to be fed into a convenient, user-friendly interface.

**Reliable Data** – Leverages CashEdge's industry-leading technology to provide reliable access to aggregation sources so your customers have the information when they want it.

**High-Quality Data** – Offers normalization and enhancement features that format data to an industry standard format, allowing aggregated data to be fed into your user interface.

**Daily Updates** – Provides end-users with an accurate and timely view of their finances.

**Transaction-Level Detail** – Provides a complete picture of finances by showing the entire financial portfolio.

**Flexible and Scalable Architecture** – Enables single sign-on and seamless integration with your existing client-facing website or mobile application and is highly scalable to support your growing customer base.

**Access to Critical Intelligence** – Provides insight into customer preferences and behaviors, enhancing cross-selling efforts.

**Easy Set-Up** – Enables fast and simple setup for end-users.



With AllData, customers can access an accurate, timely, comprehensive and secure view of their personal finances from a website or mobile technology application.

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## Benefits to Providers

- Widest and deepest coverage in the market
- Unmatched data quality
- Reliable and scalable
- Enhanced consumer insight
- Increased opportunities to cross-sell products
- Improved customer satisfaction and retention
- Industry-leading security and privacy

## Benefits to Consumers

- Convenient access to a complete view of personal finances
- Increased ability to make knowledgeable financial decisions based on a holistic view of finances
- Unmatched security and privacy of personal financial information

## Unmatched Technology

AllData leverages CashEdge's successful track record in delivering trusted technology solutions to provide the widest and deepest aggregation coverage available in the market. CashEdge delivers aggregation data from more than 10,000 sources, including banking, investment, retirement, insurance, credit card, mortgage, loans and bill information, as well as hard-to-access assets, such as life insurance, annuities and REITs.



“For wealth managers, account aggregation has been a tool that has helped practitioners acquire a sustainable competitive advantage that could not have been achieved in any other cost-efficient way.”

– Investment Advisor

## About CashEdge's Account Aggregation Services

CashEdge is the preeminent provider of financial account aggregation services to brokerages, wealth management firms, financial advisors and providers of professional and personal financial management applications. These services are highly secure and provide a holistic view of a client's or consumer's financial picture, delivering aggregated data from more than 10,000 sources, including self-directed brokerage and retirement accounts, as well as hard-to-access assets, such as life insurance, annuities and REITs.