

Account Aggregation for Self-Directed Investors

AllData® Investor (AllData) empowers your investment clients to unlock the door to their complete financial picture. Thousands of financial institutions use AllData to build stronger customer relationships and create opportunities for additional revenue, making it the industry's leading account aggregation service.

By providing AllData Investor, you give your investment clients the insight they need to uncover new financial opportunities, maximize their financial holdings, monitor performance and make better-informed financial decisions.

AllData Advisor is the industry's leading account aggregation service. Thousands of financial institutions use it to build stronger customer relationships and create opportunities for additional revenue.

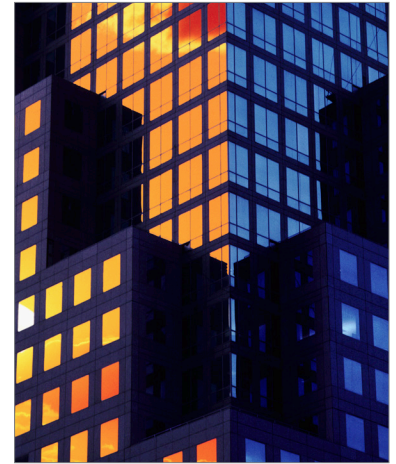
AllData Key Features

The Widest and Deepest Coverage Available – Delivers access to more than 12,000 data sources, including banking, investment, retirement, insurance, credit card, mortgages and loans.

Unmatched Security – Leverages the same technology that is used by the world's leading financial institutions to safeguard Internet banking websites to protect personal information, including usernames, passwords, and account and transaction data.

Superior, Reliable Data – Supplies detailed and accurate data that is updated daily in real time, ensuring data integrity that investors can count on.

Engaging Investor Experience – Provides a complete view of personal financial holdings, as well as interactive tools, enabling investors to monitor portfolio performance, review assets, track goal planning and progress and access financial news and analysis.



With AllData Investor, you become the center of investors' financial lives, providing access to a complete, real-time view of their finances and the insight they need to uncover financial opportunity.

“Four in five online mass-affluent investors have visited their primary investment firm's website, and the majority have used the site's content and functionality.”

– Forrester

AllData® Investor

Benefits to Financial Institutions

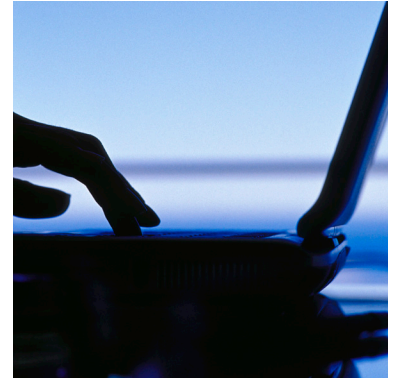
- Position your institution at the core of your investors' financial lives
- Gain insight into investors' held-away assets
- Increase client engagement and loyalty
- Deliver more personalized financial guidance
- Cross-sell additional financial products

Benefits to Investors

- Convenient access to a complete portfolio view
- Enhanced ability to track performance of investments
- Increased ability to make well-informed financial decisions
- Stronger, more valuable advisory relationship

12,000 Data Sources:

- Bank accounts
- Investments
- Retirement accounts
- Insurance plans
- Credit cards
- Mortgages
- Annuities



AllData leverages a long and successful history in the advisor space to provide an account aggregation solution that meets the exceptional data quality required by high net-worth advisors and their clients.

About CashEdge AllData® Aggregation

AllData® is the industry's leading account aggregation service. Delivering data from more than 12,000 sources, AllData creates a comprehensive view of a customer or investor's financial picture. This holistic view powers better-informed financial decisions for banking and investor customer segments and provides institutions with greater client insight. With this insight, institutions are more effective at developing stronger customer relationships and generating additional revenue.

AllData is a service of CashEdge, a division of Fiserv. For more information, visit www.cashedge.com.