

Personal Financial Management for Consumers

AllData® Retail (AllData) empowers your customers to unlock the door to their complete financial picture. AllData is the industry's leading account aggregation service. Thousands of banks, other financial institutions and providers of emerging financial applications leverage AllData to boost the value of their offering.

By offering AllData to your customers, you give them convenient access to a complete, real-time view of their finances from within your online banking portal. This comprehensive view provides the insight they need to uncover new financial opportunities and increases their ability to make well-informed financial decisions. The ability to share all held-away account data with their financial advisor results in better financial guidance.

Built on industry-leading technology, AllData accesses financial information from more than 12,000 sources on a daily basis. AllData also features seamless integration with existing applications and user interfaces and offers an interactive view that brings investors' entire financial portfolios to life.

What's In It for Your Customers?

Financial Dashboard – Provides customers with a consolidated view of assets and liabilities held at all of their online financial institutions, as well as a snapshot of their net worth, income, expenses and savings goals.

Expense Categorization Engine – Categorizes transactions automatically, based on user preference and built-in rules, enabling users to track and manage their activity.

Budget Wizard – Enables users to create a budget within minutes. AllData automatically tracks spending for each category, helping users adhere to their budget.

Customized Spending Alerts – Notifies customers when they are approaching their spending limit for a particular category. Alerts can be sent via email or SMS text message.



With AllData, customers can access a complete, real-time view of their finances within your online banking portal—gaining the insight they need to uncover financial opportunity.

AllData® Retail

What Makes AllData Different?

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.

Reliable Data – Supplies detailed and accurate data that is updated daily, in real time.

Simple Setup – Enables fast and simple account setup for users.

Integrates with Existing Applications – Integrates seamlessly with your existing client-facing website or mobile application and is highly scalable to support a growing customer base.

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



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.