

ByAllAccounts eliminates your need for manual data entry.

ByAllAccounts (BAA) gathers data from thousands of financial institutions providing you with a unified client view.

This view provides transparency into your clients' held-away assets enhancing your ability to provide a holistic financial plan.

These assets include variable annuities, REITs, offshore funds, 401(k)s, 529 plans, IRAs, bonds, brokerage accounts, cash and equivalents, checking and savings, equities, ETFs, mutual funds, proprietary investments, and sweep accounts.

Key Features:

- Data gathering, retrieving prices, positions, and transactions
- Customizable data translations
- Security – user login information maintained by office or client

For More Information:

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