

Create Innovative Wealth Management Solutions With Investnet | Yodlee Aggregation API

As a developer creating financial wealth management apps, you want to set your apps apart from the competition, implement them at lower cost, and bring them to market faster. Investnet® | Yodlee® APIs can help you achieve this and give you access to the financial tools and analytical data you need to power the personalized wealth management solutions consumers are looking for.

Fintech Innovator Advantages

- Quick and easy onboarding of accounts
- Consolidation of customer assets into one easy-to-navigate dashboard that offers a 365-degree view of investment portfolios
- Unprecedented access and transparency and streamlined portfolio management
- Synchronized API Data Extracts serving customers the latest up-to-date transaction data
- Ability to offer 401k investment options

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With real-time access to data, payments, and digital security, Yodlee APIs create, improve, and enhance your financial applications to help consumers better manage their wealth and make smarter financial decisions. In today's new economy, money is data, and as the pioneer in data aggregation and Personal Financial Management (PFM), Investnet | Yodlee sets the industry standard for data aggregation-enabled consumer solutions.

Not All Data Aggregation Engines Are Equal

Leverage established technology and banking relationships and get a running start to creating financial services that go beyond aggregation to analysis and advice. With Investnet | Yodlee's robust Financial Data Platform, you can avoid having to reinvent a costly infrastructure, and easily create and distribute products and applications built with the most trusted financial data available.

With access to real-time, historical financial data across all client and asset classes with the Yodlee Account Aggregation API, you can build integrated applications that offer customers a holistic view of their finances. And with a centralized repository to financial data specific to each consumer, you can customize services and solutions for a more meaningful and engaging customer experience.

In addition to getting a clearer picture of their finances, consumers can fund accounts and transfer money with Yodlee Account Verification API. Account access is verified in seconds, for a seamless user experience.

Over 15,000+ Data Sources and Growing

The Investnet | Yodlee cloud-based Financial Data Platform supports data aggregation from over 15,000 global sources, including many of the largest financial institutions, making it the ideal foundation for any digital banking or money management system, application, or service.

Yodlee's Financial Data Platform is the innovation delivery system for this data, providing bank-level security and encryption and APIs that enable flexible, innovative, and multi-channel distribution systems.

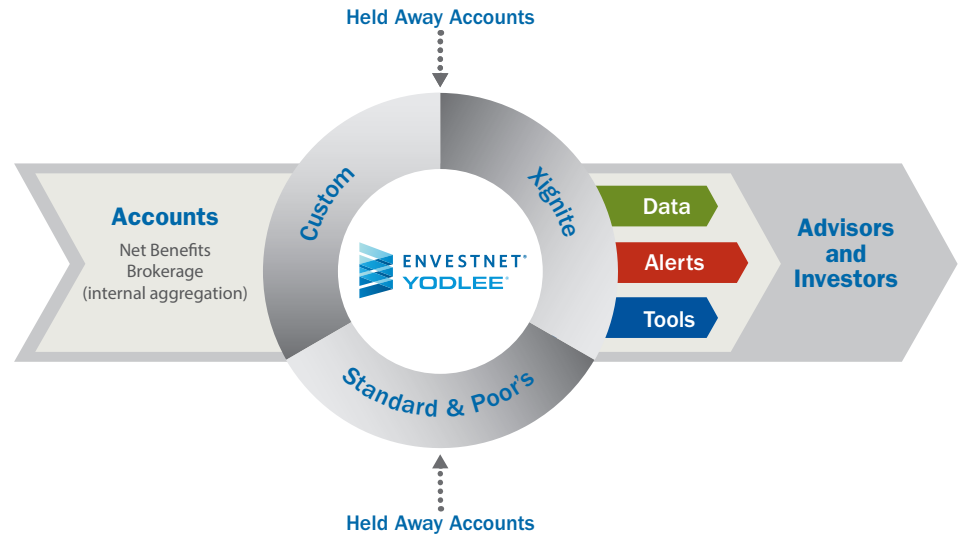
Consumer Advantages:

- Holistic view of all accounts in one place
- Simple and intuitive interface
- Easy access to current account balances and transaction activity
- Ability to manage and monitor personal financial information
- Increased collaboration with wealth advisors who can provide strategic goal-based advice and guidance
- Opportunity to choose from a range of 401k investment options

Build Yodlee APIs into Solutions for Wealth Management Apps:

- Portfolio management
- Investment planning
- Goal-based planning
- Budgeting
- Net worth summary
- Real estate/home value tracking
- Expense analysis
- 401k holdings and investment options

Data Aggregation Enables Deeper Engagement and Management of Customers



Gain an Edge with 401k Investment Options Data

In addition to 401k holdings, Envestnet | Yodlee is also able to provide 401k investment options, which is largely unprecedented in current consumer wealth management apps. Advisors can maximize their client relationships by reviewing 401k investments for suitability, and identify which assets are eligible for transfer and management. Consumers also benefit from an advisory review of potential 401k fees, and identification of investments that meet their goals.

To find out how the Yodlee Financial Data Platform can help you develop revolutionary and personalized wealth management solutions, please contact an Envestnet | Yodlee sales representative.



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