

BYALLACCOUNTS® • PRODUCT SHEET

# Premium Data for Cryptoassets

Today, access to cryptoasset data is fragmented, and data sources may be unreliable. Crypto is a complex and rapidly evolving new asset class. The lack of visibility into cryptoassets keeps advisors from providing truly holistic and personalized advice to their clients.

Morningstar ByAllAccounts Premium Data for Cryptoassets provides client aggregation of cryptoassets to allow advisors to deliver holistic financial advice and enable performance reporting.

Through these premium data connections, advisors can invite their clients to securely aggregate their cryptoassets from top exchanges to gain read-only access to end-client information. **Coinbase, Gemini, and Kraken (imminent)** are the top crypto exchanges available. The service will continue to grow and add new exchanges over time—Robinhood and PayPal will be the next to be added. Cryptoasset data can be delivered via nightly files each day or through real-time API (Application Programming Interface) connectivity.

These new connections leverage OAuth as a means of authentication, eliminating the need for ByAllAccounts to use the users' login credentials. Leveraging OAuth also results in quicker aggregations and less disruption and downtime to the aggregated accounts.

With this new premium data offering, wealth management firms and their advisors will have more visibility into held-away cryptoassets, with the ability to:

- View assets held on exchanges and custodial platforms
- Reconcile custodial and non-custodial data into a single data set
- View all transactions and transfers made by individual wallets
- Understand cryptoassets for tax planning
- Know location of cryptoassets to assess the exchange or wallet risk; liquidity data on how long positions may be locked (i.e., staking)
- Create estate plans for holdings either at centralized exchanges or onchain

## The Benefits of Using ByAllAccounts

### Wealthtechs/Enterprise Home Office

- Visibility into investors' cryptoassets
- Enable a superior user experience
- Streamline back-office efficiencies

### Advisors


- Visibility into clients' cryptoassets
- Build strong relationships and provide personalized advice
- Increase efficiency through automated data collection

### Investors

- View a complete financial picture and net worth including cryptoassets
- Receive more actionable and personalized guidance

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## Contact Your Local Sales Representative

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Ready to make aggregated data your most valuable asset? See for yourself why ByAllAccounts® delivers more accurate data for more informed financial investment decisions.