

IAS ALLIANCES

Building Synergies for Success



ByAllAccounts founded in 1999, delivers reconciliation-ready data to investment management and advisory firms. ByAllAccounts provides an unparalleled access to financial account data from thousands of custodians and enables efficient and timely account reconciliation, performance analysis and consolidated reporting. This additional account aggregation service allows you to import transactions from other financial institutions, not readily available through other downloads. Using this relationship, you can complete the client's financial data to support planning and portfolio functions.



CashEdge® provides account aggregation services, powered by their banking, brokerage and other financial relationships. Where direct custodian downloads are not available on IAS, the CashEdge interface empowers you to automate the collection of additional client financial information – allowing you to provide a more comprehensive picture for clients, without all the work!



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Laser App Software is designed for the registered rep/agent who is tired of filling out applications. Laser App Software is a library of over 3000 mutual fund & clearing firm, insurance, broker-dealer and money management forms. Forms are updated on a daily bases and can be downloaded 24 hours a day, 7 days a week from our secure website. Laser App automatically fills out these forms for the rep/agent, using the rep's own client information.



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Mosaic provides "better business outcomes" by helping clients move to paperless business processes that are faster and more efficient. Mosaic's solutions are the alternative to filing paper in file cabinets or electronic files in folder trees, helping clients avoid spending time looking for files in response to customer, auditor, and vendor requests. Mosaic's clients have all of their "paper" and "electronic" documents blended into a unified and easily searchable archive.



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Global Index Advisors created the first and only series of Portfolio Indexes. Portfolio Indexes are used to benchmark total portfolios at various levels of risk. Dow Jones Global Portfolio Indexes and Dow Jones U.S. Portfolio Indexes are currently published in the Wall Street Journal and major index databases as standard benchmarks for total portfolio performance. This partnership provides these models to IAS, as well as includes their asset classification service.

IAS: The only unified wealth management solution.
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