AGGREGATOR®

AllBackoffice Enterprise Solutions

Technology and Service Solutions for Fintechs and Enterprise Financial Services

The largest barrier to entry for software firms is getting existing client data into their applications.

Growing financial technology firms (Fintechs) and enterprise financial organizations must overcome exception-based obstacles for each new onboarded client. These firms require their key resources to remain focused on their core competency, whether that is software development or financial services.

However, the onboarding teams for these companies must overcome the workflow friction which can potentially slow onboarding of great clients. Challenges such as complex onboarding, database conversions, software integrations, technology and process training, ongoing support, process adaptation and even one-off custom requests can all slow or kill an opportunity.

Fintech Solutions for the Enterprise

AllBackoffice Enterprise Solutions grew from the needs of our own seasoned fintech and financial services professionals. We have all experienced the frustration of having an ideal client ready to come aboard, only to discover some immovable challenge to the transition.

Our solution set is designed to help our larger RIA and Fintech partners to provide their clients with a top shelf onboarding experience. Most technology companies, as well as enterprise financial services companies must allocate resources to their core focus, AllBackoffice offers an expandable team for these common obstacles.

For Aggregating and Merging RIAs

- Offering an Expandable Transition Team
- Focused Support for Client Onboarding and Account Papering for Merging Teams
- Software Transitions –Custom Conversions and Implementation for New Team Members
- Custom Software Tools – Development, Modification and Support
- Custom Software Integration
- Account Aggregation and Internal Data Flow

For Fintechs

Aggregator® Data & Account Aggregation – AllBackoffice offers both data aggregation

- Traditional Account Aggregation offering quality transaction and position data on a daily basis. Account data aggregated with bot screen scraping and Open Authorization (OATH)
- Available via API or existing User Interface. Widget Options Also Available
- Transaction Data Also Available with Reconciliation-as-a-Service

Aggregator® Software Development & Integration – A La Carte

- Outsourced Development Resources foe Custom Software and Integrations
- Data Integration Available for Specific Implementation
- AllBackoffice has in-house software development expertise, as well as partnerships for data integration.
- This solution is designed to help Fintech's close deals that are falling just short of ideal. A prospect may remain attached to some ancient desktop application or even a niche technology that must integrate with your software.

Aggregator® Data Conversions

- Data Conversions/Migrations. AllBackoffice has been performing data conversions since 2009, and key individuals, as far back as the 1990's. Conversions require careful planning, systematized data mapping, exception handling, and careful quality assurance.
- Fintechs – No software company can avoid data or document migration challenges. AllBackoffice can be a dedicated or add-on team for this work.

Aggregator® Onboarding/Training/Technical Support

- Support - Leverage AllBackoffice people and know-how to optimize advisor and end-client onboarding and US based technical support via email or phone
- Technical Writing, Videos and Training

Aggregator® Marketing Administration

- Marketing and Client Communication – For early phase fintechs a dedicated partner like AllBackoffice can help with launch and growth marketing. AllBackoffice is a data and people service company, with both in-house experts and a network of marketing resources.