

The source of truth.

Every major decision begins with extensive research. As a trusted advisor, being able to access comprehensive and accurate data whenever you need it is crucial.

Having multiple data sets in one easy-to-access location helps to drive transparency and personalisation, offering customised insights, advice and alerts for your customers and helping you to make informed decisions with confidence.

Why use multiple sources?

Compiling data from multiple sources offers superior flexibility and choice, giving you the freedom to help your clients meet their financial goals. It is also possible that your clients may have amassed multiple investment accounts over the years that may not be advantageous to consolidate for taxation reasons.

The Integrated advantage

Integrated offers complete back office freedom with a range of customisable features that allow you to focus on creating long-term opportunities.

Access financial data simply and securely

At Integrated, our intuitive API architecture and simplified data model makes data aggregation easy. Our APIs provide accurate and up-to-the-minute data that has been extensively reviewed, enriched and mapped for consistency.

Flexible formats

We have the ability to accept data from anyone involved in your ecosystem, in whatever format best suits you and your clients. This may be API, EPI, file-based integration or an Excel template – whatever works for you, we can make it happen.

Complete peace of mind

Any data that you house with Integrated will always belong to you, securely stored for added peace of mind. Should you decide to no longer use Integrated's features in the future, our friendly team will bundle all available data in a format for your new data aggregator to use.



Since our story began in 2010, we have remained committed to offering the highest value products and services across all aspects of portfolio administration. With over \$6 billion under administration, Our goal is to simplify the complex, creating reliable and straightforward solutions that create complete back office freedom for our clients.

For more information, call Nigel Singh on **0433 502 568**.



We simplify the complex

• integratedportfoliosolutions.com.au