Data Aggregation

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How do get clients started using Albridge Data Aggregation?
Albridge Data Aggregation's start-up process is twofold. The first step is performed by the advisor, the second by the client. Follow the below instructions to invite clients to use Data Aggregation and to learn how to assist them in setting up their accounts to be aggregated.

Inviting Clients

For clients to participate in Albridge Data Aggregation services they need to be invited by their advisor. To invite your clients to register for Albridge Data Aggregation, follow the steps below:

1. Log into Albridge Wealth Reporting and click on the yellow CashEdge "Log In" button. This is located on the left side of the screen under the Control Center.
2. Select the Manage My Book tab. Here you can check off individual clients to invite or invite all clients.
3. Select investors from the client roster, then click "Invite."
4. Select a template to use for the invitation letter (Standard or Reminder) and then click "Next."
5. Review the invitation text and then click "Next."
6. Confirm the Invitation Recipients list.
7. Click the "Send" button to complete and send the client invitation(s) in an email.

Client Registration for Aggregation

Clients will receive your invitation to register by email. To complete their registration, clients will need to take the following actions:

1. Clients should click the registration link in the invitation email to connect to the site and complete their registration.
2. Click the yellow CashEdge "Register" button located on the left side of the Webpage.
3. Read and accept the Account Aggregation User Agreement. Once they click on "Accept" the registration process is complete and clients are now ready to start adding their accounts.

Adding Accounts

The process of adding client accounts to be aggregated is completed by the investor. Below are the steps that investors need to take to successfully set up their accounts:

1. Select the "Add Accounts" tab to either Search for a New Institution or to Add New Accounts to a Registered Institution.
2. Enter a name in the Search field and click the "Submit" button, or use the Browse button to select from the complete list of supported institutions.
3. Enter the appropriate User ID and Password for the account/financial institution and click the "Submit" button.
4. Select the accounts that you want to add and fill in any corresponding account fields. Click "Submit" once all fields are complete.
5. Review the information on the Account Confirmation screen and then click the "Submit" button to complete account set-up.

Editing/Deleting Account Information

Since investors are the ones aggregating their accounts, only they are allowed to edit their actual account information. To edit information, investors should select the "Profiles" tab and then the Account Nickname or Financial Institution name they would like to edit. The Profiles screen will also allow them to Delete the Institution.
Advisors can edit the Client Profile (name, email address) or delete the client altogether from the Utilities tab.