



Integration with Morningstar® ByAllAccounts®



If you use Morningstar® ByAllAccounts® to gain visibility into your clients' assets, develop better plans, and seek better outcomes for your clients, you can now use Max as a solution for client cash and report on the assets using most reporting platforms.

Integration Benefits

Clients appreciate Max's industry-leading cash management solution, whether they use it for a set amount of cash (such as an emergency fund) or to earn more than a money market fund on cash in their portfolio. In today's interest rate environment, every basis point counts.

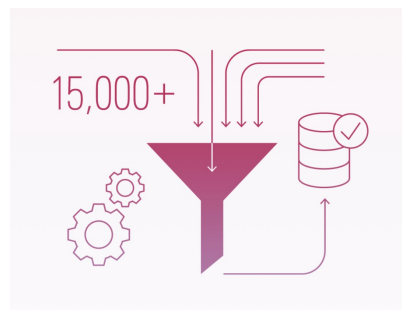
You can now report on your clients' total Max cash balances in more than 40 different reporting packages using ByAllAccounts. Whether you want a more holistic view of your clients' financial picture or are looking for a more time-efficient way to sync the data between your different reporting systems, Max's data integration with ByAllAccounts can help.

How It Works

You want aggregation without aggravation, so we designed our integration so that your clients don't have to lift a finger.

Simply authenticate with ByAllAccounts once using your existing Max Advisor Dashboard login and all your clients' balance data will appear. Data is sent nightly to Morningstar and reported as a total balance as of a particular data.

Note: If you need real-time balances, login to the Max Advisor Dashboard and click "Refresh" to refresh balances. Updated balances will be reported the next day on ByAllAccounts.



Morningstar ByAllAccounts gathers data from thousands of sources, including Max.

Get Started Today

To get started, have the person at your firm who sets up accounts in ByAllAccounts follow the standard procedures to add a new source of data using the name "MaxMyInterest" as the institution and authenticate with the advisor's credentials (not the client's).

If you aren't yet a Morningstar ByAllAccounts customer, contact the Sales team at Morningstar directly to obtain access. For support, contact ByAllAccounts Technical Support at 866.856.4951 or email: byallaccounts-support@morningstar.com.

To learn more, contact advisors@maxmyinterest.com or visit [MaxForAdvisors.com](https://www.MaxForAdvisors.com).