

ACCOUNT AGGREGATION

The global aggregator of your clients' financial data connects Openfinance to any custodian in the world



Connects Openfinance solutions to any custodian in the world through its scraping technology using reverse engineering.



Extracts, standardises and checks the financial data of any financial product on a daily basis.



Automatically consolidates the positions and transactions of clients of the entity. It currently has over 300 million aggregate accounts.



Offers a global vision of client position in order to offer them comprehensive advice.

Functions of the solution



DESIGNED FOR WEALTH MANAGEMENT

It offers a global and detailed view of the position of your essential clients both in generating reports and in financial advice.



ENHANCES ADVISORY SERVICE

It allows you to know the wealth of the client in order to provide advice on the client's entire risk perimeter, which improves the suitability of the investment proposals.



GLOBAL GEOGRAPHICAL COVERAGE

Integration with any custodian in the world in a period of one to two weeks. It includes over 200 custodians in 17 different countries.



SECURITY

Flank is an entity that is authorised by the Bank of Spain to provide the account information services under regulation PSD2. It performs complete GDPR and security checks that are audited by Deloitte and other institutions.



TYPES OF SUPPORTED FINANCIAL PRODUCTS

It extracts the position and transactions of any financial product: fixed income, equities, ETFs, CFDs funds, pension plans, current accounts and cryptocurrencies.



LOWERS COSTS OF INTEGRATION

Openfinance clients benefit from all the financial entities supported by Flanks.

Advantages for business

- 1 It **automates** the entire process of **aggregating the financial data** of Openfinance clients.
- 2 It helps **increase the assets under management** from Openfinance clients thanks to the ability to provide multi-custodian financial advice, i.e. separate from the bank where the clients have deposited their investments.
- 3 It makes it possible to perform **fiscal optimisation** as it has a global view of all the transactions performed by the clients in recent years.
- 4 It **mitigates the high operational risk of aggregating data** manually.
- 5 It **allows for reduction of the high costs** involved in **manually updating** the client's aggregate **information**.
- 6 It makes it possible to offer a **multi-custodian family office** service to entities, which mitigates operational risks and the costs of integration.

Our solution

Conecta con la entidad financiera



















Si deseas conectar la entidad financiera directamente desde la plataforma, pulsa el botón "Conectar". Si, por el contrario, necesitas un enlace para que una tercera persona conecte la entidad, pulsa el botón "Generar link".

CONECTAR

GENERAR LINK

Selecciona la entidad donde tienes los fondos

Buscar...

Volver

Testbank

Usuario

Contraseña

Tus credenciales son almacenadas de forma segura por Flanks. Haz click [aquí](#) para saber más sobre este tema.

☐ Acepto que Flanks agregue mi información financiera proveniente de otras entidades.

Al usar este servicio, aceptas los [Términos y Condiciones](#) y la [Política de Privacidad](#) de Flanks.

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