

Yodlee Financial Data Aggregation Platform for Salesforce AppExchange

The Yodlee® Financial Data Aggregation Platform for Salesforce® provides businesses with a single, comprehensive view of the data they need to build deeper one-to-one client relationships with their clients. Yodlee Financial Data Aggregation Platform for Salesforce, available on the AppExchange, provides users with their clients' financial data along with CRM to holistically manage their clients' financial lives.

Advantages for Businesses

- + Centralized data hub for managed and held away accounts
- + Improve job productivity
- + Improve data insight for cross selling campaigns
- + Assists "Know Your Client" requirements
- + Easily integrate applications in the Salesforce ecosystem

Advantages for Clients

- + Improve service, efficiency, and overall experience
- + Richer, more precise customer service
- + Plug and play widgets for customer facing portals
- + Truly customized financial solutions and approaches
- + Greater automation and more streamlined processes
- + Enable data-based, real-time advice

Connect with Clients

The business sector is fiercely competitive and getting more so every day. There is an enormous amount of pressure on businesses due to the digital revolution and big data. However, with challenge comes immense opportunities. Businesses that can get ahead of the curve have much to gain. The key to getting the upper hand in this environment is data—accessing it, harnessing it, and using it to users'—and ultimately their clients'—advantage. To help achieve this, Yodlee has built an application on the Salesforce AppExchange. By connecting Yodlee's industry leading financial data aggregation solution with the Salesforce platform, the business and their client will now be able to collect and connect user-permissioned end-user account data from approximately 14,000 sources (such as bank accounts and 401ks) to provide businesses with a holistic view of their client's finances across accounts, which allows for more streamlined processes. Activity and information can move seamlessly from Yodlee to Salesforce, giving users a single, comprehensive view of their clients' held away accounts.

With a 360-degree view of their clients' financial accounts, businesses can now deliver smarter, more personalized engagements that lead to increased assets under management and improve regulatory compliance. Businesses will also enjoy greater transparency for ever-increasing "Know Your Client" requirements. Finally, the open-standard, cloud-based Salesforce platform will enable greater productivity and increased revenue.



Timely, Relevant, and Actionable Financial Data

With Yodlee's data on the Salesforce platform, businesses are positioned to help clients achieve their financial goals and bring assets in-house. Detailed information includes:

- Account summary data across all of a client's financial accounts – investment, banking, credit cards and loans
- Investment holdings
- Liability balances
- Home and property values

Accounts	
All Accounts	+ Add Account Print
View by Account Type View by Assets & Liabilities	
Investments (2)	
Dag Site - Investments	\$ 69,878,521.00
DAG INVESTMENT - xxxx5555 Go to site Settings	
Verisight - Investments	\$ 9,116.67
YODLEE INC 401K PLAN - xxxx0031 Go to site Settings	
TOTAL: \$ 69,887,637.67	
Suggested Accounts - Remind me later	
PG&E (US) - Add Account	

Figure 1: Add Accounts for a Holistic View.

Credit Cards					
Action	Institution	Account Name	Nickname	Account Number	Running Balance
Edit Del	American Express	Platinum Delta SkyMiles	Delta Amex	xxxx3002	\$6,126.46
Edit Del	Macy's	Macy's CC	Macy's Amex	xxxx5722	\$35.25
Loans					
Action	Institution	Account Name	Nickname	Account Number	Principal Balance
Edit Del	Wells Fargo	Loan	Loan	xxxx3885	\$10,084.33
Investment Accounts					
Action	Institution	Account Name	Nickname	Account Number	Total Balance As Of Date
Edit Del	Edward Jones	Trad IRA-1	Jones Retirement	xxxx5622	\$157,321.31 6/1/2015
Edit Del	Verisight	Yodlee Inc 401K Plan	Yodlee 401K	xxxx0031	\$8,437.08 6/2/2015
Holdings					
Action	Holding Name	Description	Quantity	Price	Value
Edit Del	FRBAX	Franklin Total Return Fund CL A	2,290.68	\$10.08	\$23,090.05
Edit Del	FRGGS	Franklin Flex Cap Growth Fund CL A	166.28	\$52.74	\$8,768.71
Edit Del	FRDVS	Franklin Dynattech Fund CL A	324.46	\$49.81	\$16,161.15
Edit Del	FRGGS	Franklin Growth Series Class A	344.76	\$78.08	\$26,918.54
Edit Del	FRGGS	Franklin Rising Dividends Fund CL A	319.05	\$52.94	\$16,922.11
Edit Del	FRGGS	Franklin Mutual Global Discovery Fund CL A	820.31	\$34.72	\$28,421.26
Edit Del	TEMLX	Templeton Foreign Fund CL A	1,575.31	\$7.56	\$11,909.32
Edit Del	TEMLX	Templeton Global Smaller Companies Fund CL A	1,380.91	\$9.15	\$12,635.35
Edit Del	TEPLX	Templeton Growth Fund	503.92	\$24.69	\$12,441.83
Edit Del	VANGRX	Vanguard Mid Cap Growth	236.10	\$26.13	\$6,169.19

Figure 2: Aggregated View of Finances.

INVESTMENT REPORTS						BANKING REPORTS			CREDIT CARD REPORTS		
Investments						Bank Accounts			Credit Cards		
Institution	Account Name	Holding Name	Quantity	Price	Value	Institution	Account Name	Current Balance	Institution	Account Name	Running Balance
Full Name: Harry Sporan						\$45.16			\$5,161.71		
Edward Jones	Trad IRA-1	TEMLX	1,575.31	\$7.56	\$11,909.32	Ally Bank	Interest Checking	\$45.16	Macy's	Macy's CC	\$35.25
Edward Jones	Trad IRA-1	FRGGS	344.76	\$78.08	\$26,918.54				American Express	Platinum Delta SkyMiles	\$6,126.46
Edward Jones	Trad IRA-1	TEPLX	503.92	\$24.69	\$12,441.83						
Edward Jones	Trad IRA-1	FRBAX	2,290.68	\$10.08	\$23,090.05						
Edward Jones	Trad IRA-1	TEMLX	1,380.91	\$9.15	\$12,635.35						
Edward Jones	Trad IRA-1	FRGGS	319.05	\$52.94	\$16,922.11						
Edward Jones	Trad IRA-1	FRDVS	324.46	\$49.81	\$16,161.15						
Edward Jones	Trad IRA-1	FRGGS	166.28	\$52.74	\$8,768.71						
Verisight	Yodlee Inc 401K Plan	VANGRX	236.10	\$26.13	\$6,169.19						
Full Name: Martin Cronbie						\$102,389.31			\$102,389.31		
First Republic Bank	FRB 401(k) Retirement	CASH	87,088.31	\$1.00	\$87,088.31	Ally Bank	Interest Checking	\$45.16			
Verisight	Verisight 401(k)	GOLD	75,300.00	\$1.00	\$75,300.00	Ally Bank	Interest Checking	\$45.16			
Full Name: Tampa Cronbie						\$45.16					

Figure 3: Net Worth Report Summary.

To learn more, please contact a Yodlee sales representative.

About Yodlee

Yodlee (NASDAQ: YDLE) is a leading technology and applications platform powering dynamic, cloud-based innovation for digital financial services. More than 900 companies in 15 countries, including 11 of the top 20 U.S. banks and hundreds of Internet services companies, subscribe to the Yodlee platform to power personalized financial apps and services for millions of consumers. Yodlee solutions help transform the speed and delivery of financial innovation, improve digital customer experiences, and deepen customer engagement. Yodlee is headquartered in Redwood City, CA with global offices in London and Bangalore.

Yodlee is headquartered in Redwood City, California. For more information, visit www.yodlee.com.