

Financial Aggregation-Powered Tools Increase Customer Retention



A recent study by Envestnet | Yodlee shows that investors who use financial account aggregation and money management apps and tools powered by data aggregation are more engaged and loyal to their wealth/investment management firm.

Of the wealth/investment management clients who use financial account aggregation services:



76%

report they're more likely to stay with their wealth/investment management firm.



69%

are more likely to use their wealth/investment management firm for their next financial need or more likely to transfer balances to them.



69%

log in and use their wealth/investment management firm's site or app more frequently.



64%

are more likely to recommend their wealth/investment management firm to their friends and family.

Clients who use financial apps and tools powered by their aggregated data are even more loyal:



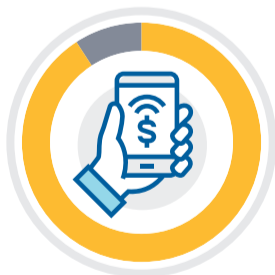
95%

report they're more likely to stay with their wealth/investment management firm.



93%

are more likely to use their wealth/investment management firm for their next financial need or more likely to transfer balances to them.



91%

log in and use their wealth/investment management firm's site or app more frequently.



91%

are more likely to recommend their wealth/investment management firm to their friends and family.

Source: Envestnet | Yodlee Aggregation and Wellness Survey of U.S. Consumers conducted July-August 2021.

Deliver Financial Data Aggregation Tools and Solutions with Envestnet | Yodlee

As the leading data aggregation and analytics platform, Envestnet | Yodlee offers financial aggregation tools, apps, and APIs to engage, delight, and retain wealth clients for the long term.

[Contact us](#) to see how you and your clients can benefit from data aggregation today.