



**SUBJECT: Notification of Allianz Life Open Banking Migration – Wednesday, February 14, 2024**

**Preview Text:** ByAllAccounts Migration to Allianz Open Banking API

**What:** ByAllAccounts will be migrating aggregation of specific **Allianz Life Accounts** (see list below) to the open banking API.

**When:** Migration will take place on Wednesday, February 14, 2024 and screen-scraping sunset will occur on Wednesday, March 13, 2024

**Important Dates:**

	Date	Definition
<b>Conversion Date</b>	Wednesday, February 14, 2024	Date that ByAllAccounts will convert existing accounts from screen-scraping to API.
<b>New Account Enablement Date</b>	Wednesday, February 14, 2024	Date that new accounts will be routed to the API (and screen-scraping Financial Institution is hidden from new account setup. This may be the same or before the Conversion Date.
<b>Financial Institution Sunset/Removal of Screen-Scraping FIs from the ByAllAccounts Platform</b>	Wednesday, March 13, 2024	Date that ByAllAccounts will delete the screen-scraping FIs to clean up the ByAllAccounts Platform and protects resource allocation). This will be 30 days after conversion unless otherwise noted.

**Why You Need to Act:**

ByAllAccounts is transitioning to open banking APIs to provide more reliable aggregation, minimal disruption, and enhanced security. Users will now directly enter their credentials with their financial institution, ensuring a secure aggregation process. We are phasing our screen-scraping of “Allianz Life – Delegate” and migrating accounts to the API on February 14, 2024. We will be removing and sunsetting the screen-scraping source on March 13, 2024. If you do not transition to the API and re-authenticate, you will lose aggregation to “Allianz Life - Delegate”.

**Allianz Life Financial Institutions (FI) Moving to Open Banking API:**

Existing FI IDs	Existing FI Names	New FI ID	New FI Name
49415	<b>Allianz Life – Delegate (Investment)</b>	<b>112966</b>	<b>Allianz Life (Insurance)</b>

**Important Actions to Take:**

**If Your Organization Has Signed the Financial Institution Data Access (FIDA) Addendum:**

Inform your users about the upcoming migration. After the migration, users will need to reauthenticate their credentials to continue aggregating Allianz Life accounts. To assist you, we have provided step-by-step guides for advisors and consumers/clients/investors.

[For Advisors \(leveraging ByAllAccounts AccountView\)](#)

[For Consumers/Clients/Investors \(leveraging ByAllAccounts Connect User Interface\)](#)

**If Your Organization Has NOT Signed the Financial Institution Data Access (FIDA) Addendum:**

Please reach out to [Needa Memon](#) to sign the Financial Institution Data Access (FIDA) Addendum. Failure to do so will result in losing access to Allianz accounts on Wednesday, March 13, 2024.

Please contact the ByAllAccounts Technical Support Team at [allaccounts-support@morningstar.com](mailto:allaccounts-support@morningstar.com) with any questions regarding this upcoming migration.

The ByAllAccounts Team