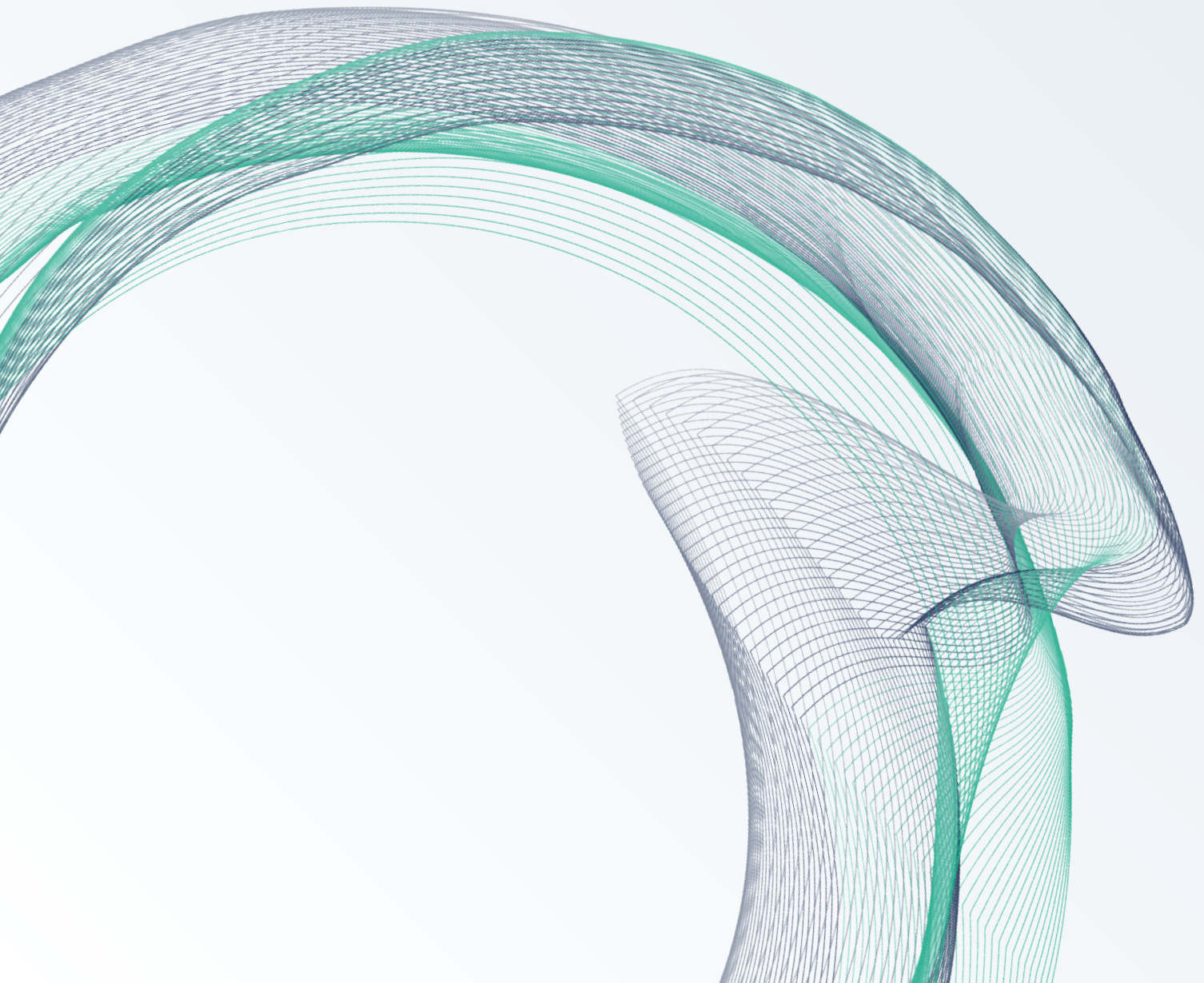




# MarketLink API

## Introduction



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## DATA, THE WAY YOU WANT IT.

Get the data, flexibility, and confidence to strengthen your business with MarketLink API. Our integration solution can be used to streamline intelligence and accelerate time-to-action for any use case. Empower your teams to discover new opportunities with the resources they need.

## CONNECT.

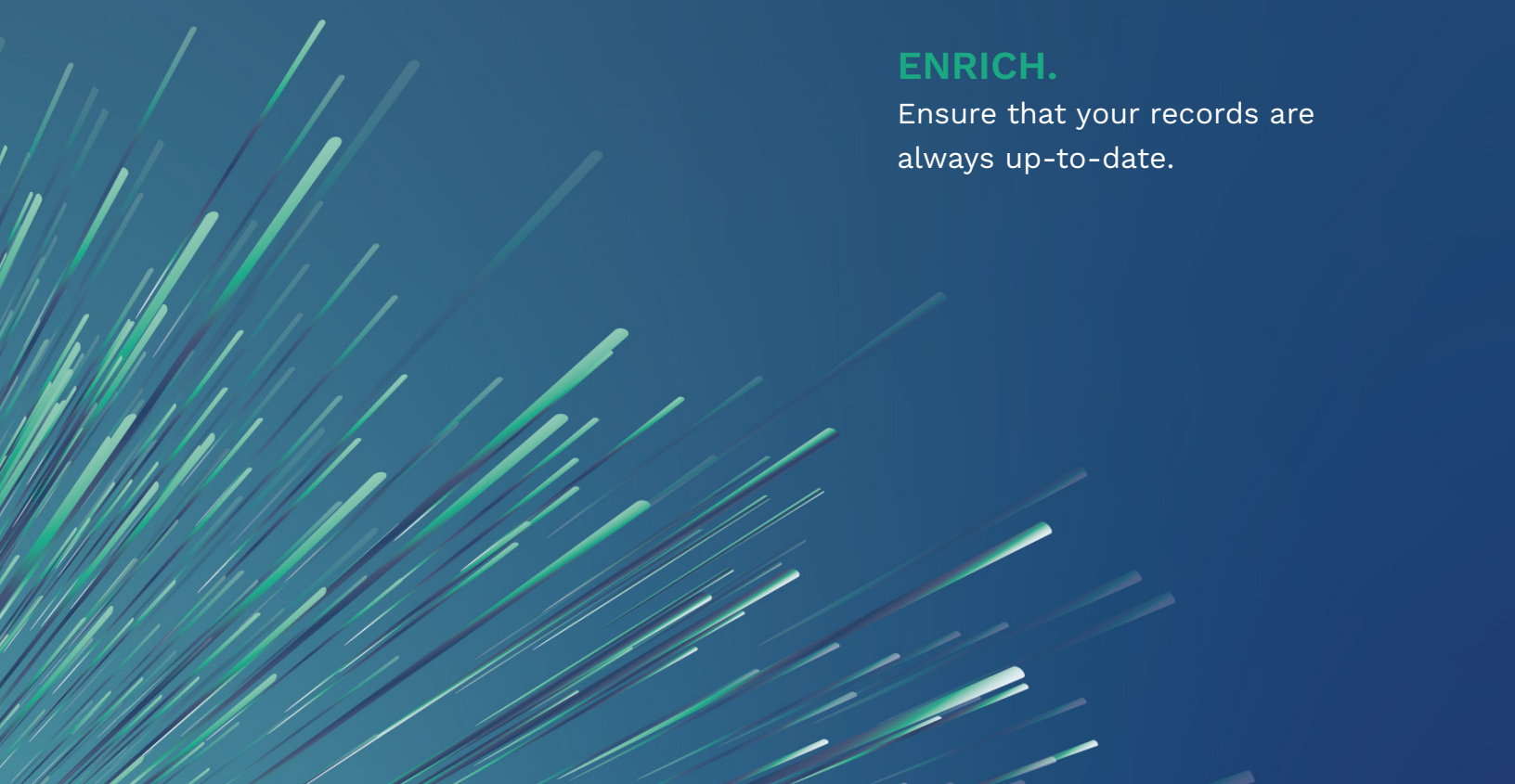
Utilize our robust database across all your technologies.

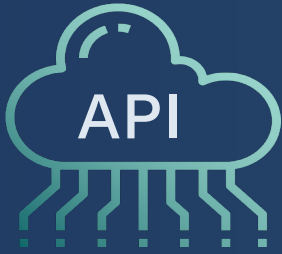
## AUTOMATE.

Simplify manual data processes for your teams.

## ENRICH.

Ensure that your records are always up-to-date.





**BEFORE & AFTER**

BEFORE	
First Name	Joe
Last Name	Advisor
Company	RIA Capital
Phone Number	
Email Address	
Discovery Data Status	
# of Discovery Data Updates	
API Titles	
API Title Categories	
API Branch Address	

AFTER	
First Name	Joe
Last Name	Advisor
Company	RIA Capital
Phone Number	504-585-1234
Email Address	name@example.com
Discovery Data Status	<input checked="" type="checkbox"/> Updated
# of Discovery Data Updates	10
API Titles	Executive Vice President; Partner
API Title Categories	Executive
API Branch Address	123 Side Street, Ste 2100 New Orleans, LA 70113

## TECHNOLOGY

### What you can expect from MarketLink API:



Open API Technology



Token & API Key Security



Integration with Various Systems



Data Frequency



API Call Specificity



Technical Documentation



And More...

## SYSTEMS

MarketLink API works with all types of systems:  
CRM (Client Relationship Management), Marketing platforms, data warehouse, etc.

While some systems have integrated API calling connection functionality (ex. Salesforce), others will require an API connection tool such as:

**Informatica | Microsoft | SSIS | Stitch**



Discovery Data will work with customers during the onboarding process, troubleshoot any issues, and provide guidance to ensure a seamless implementation with MarketLink API.

## FREQUENCY

### Weekly

Weekly access allows Client to access the MarketLink API data with 24/7 access.

### Monthly

Monthly access allows Client to access the MarketLink API data in a specific date range. It can be the 1st or 15th of a calendar month and 2 additional days, for a total of 3 calendar days of access. Single record access is available 24/7.

### Quarterly

Quarterly access allows Client to access the MarketLink API data in a specific date range. It can be either the 1st or 15th of a calendar month (Jan, Apr, Jul, and Oct) and 2 additional days, for a total of 3 calendar days of access per quarter. Single record access is available 24/7.

**Note: Discovery Data only updates each data set on a weekly basis.**



### API 24 Hour Limit

Each client will have an API limit per 24-hour period to improve performance and limit security issues.

## FINANCIAL SERVICES

Get access to the most accurate, immediate, and complete data on the firms and people essential to the financial services industry.

**44K** BD, RIA &  
Trust Firms

**120K** BD & RIA  
Branches

**760K** Professionals including  
Financial Advisors  
and Key Staff

**2.6K** Data Fields

Including Contact Information, Employment History, Licenses and Designations, Titles and Title Categories, Social Media Profiles, Firm Associates, AUM, Asset Allocations, Client Breakdowns and Investment Strategies

## INSURANCE

Discovery Data helps you connect with insurance agents that can generate revenue and grow your business.

**2.3M** Insurance Agents

**160** Data Fields

Including Contact Information, License Types, Product Specialities, Carrier Appointments, Social Media Profiles, and Firm Affiliations

### Delta Data

Clients can request only the changes to records within a defined period through the API. The data will return specific delta type values and the latest delta type on a record will display. This will help clients update their records easily.

## Managed Services

Discovery Data uses a preferred vendor to serve clients and their individual business needs.

Let us help you manage every aspect of the integration. Please reach out to our support team to discuss managed services.

Contact us at:

[marketlinksupport@discoverydata.com](mailto:marketlinksupport@discoverydata.com)

## FREQUENTLY ASKED QUESTIONS

### Is there a test or sandbox environment?

All testing will be done on production data. You will be allowed to test with a limited data set for a specified time and with 24/7 access.

### What type of support is available for MarketLink API?

Discovery Data can provide best practices and issue resolution support.

### How do you ensure the API is secure?

The authentication process generates a token to ensure a secure connection to the API.

### Can Discovery Data help clients without API expertise?

Yes – All aspects of an integration can be performed by a recommended partner.

### Where does Discovery Data source its data?

Data is provided from each regulatory state reporting process and the public domain.

### Does Discovery Data collect client data?

No, we do not collect client data.



We're here  
to help.



**Contact us at:**



[support@discoverydata.com](mailto:support@discoverydata.com)



732-933-1899

