

THOMSON REUTERS

# OPEN BANKING



## Confidently share your financial data with your auditor

Do you need to send sensitive financial information to your auditor? Thomson Reuters® Open Banking is a fast and secure option to provide your account balance and underlying transactional data. Avoid having to download, email, or print statements that may get lost or stolen. The source data is directly from the bank for a faster response time and greater accuracy.

## Getting started is easy

Your auditor will email you an invite to initiate the process, then simply:

1. Open the Account Consent Requested email to verify the requested information
2. Click the authenticated link to provide consent
3. Review the pre-populated form and select your bank
4. Proceed

**Step 1: Provide your email address**

Email \*

Confirm Email \*

**Step 2: Provide the email address of your auditor**

Email \*

Confirm Email \*

**Step 3: Search for your Open Banking provider**

Starling United Kingdom
TIM Italy
BNP Paribas Fortis Belgium
Caixa de Crédito Agrícola Mútuo de Leiria CRL Portugal
Ikano Bank Finland
SPK Mittelhüringen Germany

### Discover the benefits

- Save time with a simple, step-by-step guided process
- Ensure your banking data is only shared with the intended audience with pre-populated email addresses for you and your auditor
- Mitigate the risk of fraud and reputational risk

X Cancel
EN

## Sample Bank

**Consent to read-only access to data**

In order to provide you account information services (a consolidated overview of your accounts, regular payments and transactions via Dashboard/Digest), **Salt Edge Limited** needs your approval to access the following information from the account you hold at **Sample Bank**

Your Account Details
+

Your Regular Payments
+

Your Account Transactions for the last 365 days
+

Salt Edge Limited will access the above information from your account until: **16 August 2023**.

By ticking this box, you are also giving your GDPR consent to Salt Edge Limited to share the above information with **Capital Confirmation Inc.** (acting as **Demo-AuditConfirmation**) in order for them to provide you the requested services.

Confirm

## Authenticate open banking provider

Now you are ready to complete the final steps. You'll be guided through the secure Salt Edge authentication process. More information about Salt Edge can be found below.

**Important:** select the GDPR checkbox before confirming

## Enter bank information

Enter your login and password for your specific bank into the secure authorization form. Your credentials are not stored and go directly to the bank.

## Success!

You will receive a confirmation message and email for the accounts linked.

Immediately, the data securely passes from the bank to the Open Banking platform to be viewed by your auditor. Most auditors will get 365 days of transaction history.

Success!
×

You have successfully linked your **[Name of Bank]** account(s).

**[Your auditor's email address]** will be notified so they can retrieve the account information.

If you would like to provide access to additional accounts for other financial institutions, please complete steps 1 through 3 again.

If you require any additional assistance or would like to provide feedback, email us at [openbanking@confirmation.com](mailto:openbanking@confirmation.com) and reference request ID **42f882d9-0690-4e21-afb5-331a2e83a11d**.

## About Salt Edge

Salt Edge is a secure third party, open banking service provider. Thomson Reuters trusts Salt Edge as an ISO 27001 certified and PSD2 licensed solution to provide access to transaction history from more than 2,500 banks. After you provide consent, you will get an email from Salt Edge. No additional action is required. You may set up a password to review past consents.

## Open Banking support

Visit: [Open Banking Help and Support page](#)

Email: [openbanking@confirmation.com](mailto:openbanking@confirmation.com)