Flourish

Flourish + Black Diamond Onboarding Guide

Our direct custodial integration allows you to seamlessly incorporate your clients' Flourish balances into SS&C Advent Black Diamond.

Total estimated timeline: ~1-3 business days

Step 1: Request the integration from Flourish

Email us at integrations@flourish.com to request that the integration be enabled for your firm. *Please note: this request should come from your firm's Flourish "Executives"*.

Step 2: Fill out Direction Letter

Download the Direction Letter from your Advent/Black Diamond Portal:

1. Under the 'Data Management' section click "ACD Accounts"
2. Click "Add Authorization" near the top of the page
3. Select the Authorization Level as **'Discretionary'** to generate a Direction Letter
4. Click "Download Direction Letter" to download the letter

Complete the required information in the letter and send it to the appropriate person at your firm for signature. A few important notes:

1. Please list the following information in the top section of the letter:
    a. "ACD Interface Name" should list 'Flourish Financial, LLC' and in the parentheses on this line list "5L"
    b. "Client or Subscriber" should be your firm's name
    c. "Copy #" should be your firm's 'Advent Copy Number' which your Black Diamond support team can provide
    d. "Account Provider" should list 'Flourish'
2. The client's Flourish account number can be found in the Advisor Portal by downloading your client list. To download your client list:
    a. Log in at Flourish.com
    b. Navigate to the "Clients" tab

   c. Click on the download icon (⭳) to download your client list into a spreadsheet; the account number can be found in Column B
3. You can include multiple accounts in one Direction Letter. Please list the desired client account number(s) on the second page of the Direction Letter
   a. **Note for annuity accounts**: There may be multiple annuity accounts for an individual client that correspond to the different tax qualification statuses annuities can be classified as
   b. You can check the account type using Column E: “Account Name”. For the Direction Letter, we recommend you include any account numbers that correlate with any annuity tax qualification statuses now or in the future
4. This form may be completed via electronic or wet signature

Step 3: Return the Direction Letter to Flourish

1. Once signed, upload the Direction Letter to Flourish through this secure file sharing link: https://flourish.sendsafely.com/dropzone/documents/
2. Email support@flourish.com to let us know that you’ve uploaded the letter. Please include the account number in the email for the client account that is being authorized

Step 4: Return the Direction letter to Black Diamond

Upload the signed Direction Letters to your Advent/Black Diamond Portal:
1. Under the ‘Data Management’ section click “ACD Accounts”
2. Click “Add Authorization” near the top of the page
3. In the ‘Account Provider’ section, select “Flourish Financial LLC”
4. Select the Authorization Level as ‘Discretionary’ when uploading Direction Letters
5. In the ‘Accounts’ section, enter the Flourish Account Number(s) from the letter
6. Add the document to the ‘Letter’ upload tool
7. Click “Save” on the upper right of the page

Step 5: Data becomes available within Advent/Black Diamond

Flourish

Once you’ve returned the completed form(s) and emailed Flourish, we will whitelist the account(s) and the data will flow into your firm’s Black Diamond portal like any other integration.

Questions / Support

- For any Flourish questions, please reach out to integrations@flourish.com
- Existing Advent clients can contact Advent by submitting an Advent’s Community Online Support or via phone call
- Black Diamond users can similarly submit cases via Black Diamond’s case management portal or by contacting their Client Advocate