

# Flourish + Envestnet | Tamarac

## Onboarding Guide

Our direct custodial integration allows you to seamlessly incorporate your clients' Flourish balances into Envestnet | Tamarac.<sup>Δ</sup>

**Total estimated timeline:** 5 - 8 business days

### Step 1: Request the integration

Request the integration by emailing [integrations@flourish.com](mailto:integrations@flourish.com). Please include:

- Firm name
- Primary contact name
- Primary contact email
- Primary contact phone number

We will confirm receipt of your request and confirm once the integration has been enabled on our end.

*Please note: the email request should come from one of your firm's Flourish "Executives".*

### Step 2: Configuration

We will email Envestnet | Tamarac to let them know your firm has enabled the integration. From there, it typically takes ~5 days for Envestnet | Tamarac to finalize the data feed on their end. Once this occurs, an Envestnet representative will reach out to validate and configure the data in your system.

Envestnet may request your "Firm ID," as well as the Flourish account numbers of a handful of your clients for verification purposes. We typically include the "Firm ID" in the confirmation email we sent to Envestnet | Tamarac. Account numbers can be found by navigating to the "Clients" tab and clicking on the download icon (↓).

## Step 3: Completion

Once Flourish data is flowing into Tamarac, you will see a notice of new account data in your daily email from Envestnet | Tamarac. From this point forward, Flourish data will flow into Envestnet | Tamarac in the same manner as any other custodial integration, allowing advisors to pull data into client households.

## Questions / Support

For any questions or support issues regarding the Flourish → Tamarac feed, contact the following email addresses:

- Envestnet | Tamarac: [tamaracsupport@envestnet.com](mailto:tamaracsupport@envestnet.com)
- Flourish: [integrations@flourish.com](mailto:integrations@flourish.com)

<sup>Δ</sup>*An advisor's ability to view client account information is subject to applicable privacy laws and clients' consent to such sharing.*

Flourish is an online platform through which investors can access financial services and products. Flourish's offerings are provided by different entities and are subject to different terms, investor protections, and risks. Flourish Cash is offered by Flourish Financial LLC, a registered broker-dealer and [FINRA](#) member. **Flourish Financial LLC is not a bank.** Check the background of Flourish Financial LLC and its personnel on FINRA's [BrokerCheck](#). Flourish Annuities refers generally to the annuity platform operated by Flourish Technologies LLC and to Flourish Insurance Agency LLC, and, where applicable, Flourish Financial LLC. Flourish Insurance Agency operates in its capacity as a licensed insurance producer with offices in Jersey City, New Jersey, and does business in California under the name Flourish Digital Insurance Agency, providing insurance services related to such platform. Variable annuities, defined in this context to include Registered Index-Linked Annuities ("RILAs"), are offered through Flourish Financial LLC. Annuities shown on the platform are sold through Flourish Annuities, and are issued by one or more licensed insurance companies. The Flourish entities mentioned above are affiliates. Flourish Cash and Flourish Annuities accounts are separate accounts and only assets in Flourish Cash accounts may be eligible for protection by the FDIC or SIPC. Please review the [Legal](#) section of our website, and the disclosures provided with each Flourish service or product for further information. If you were introduced or invited to Flourish by an investment advisor or other third party, please be aware that, unless otherwise disclosed to you, they are not affiliated with any Flourish entity. The role of the investment advisor or other firm that invited you to Flourish may vary between different Flourish services and products, as further described in your terms of service. © 2025 Flourish. All rights reserved.