Flourish

Flourish + MoneyGuide Data-Feed Connection Guide

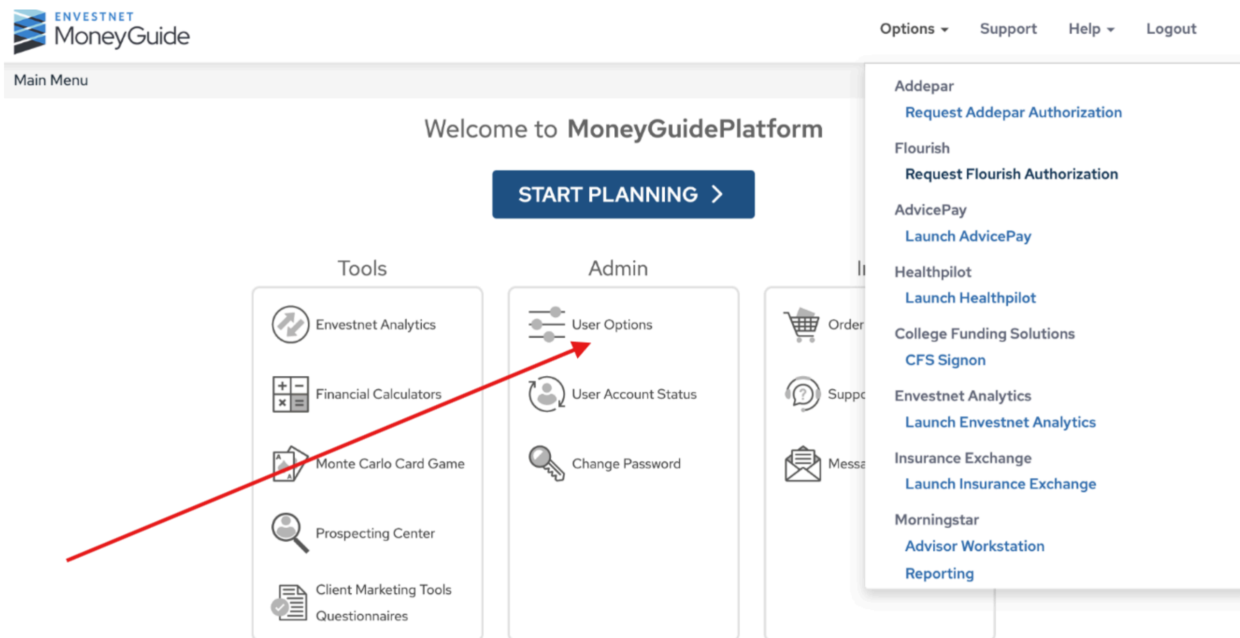
The Flourish + MoneyGuide direct custodial integration allows advisors to seamlessly incorporate clients' Flourish Cash[†] balances into MoneyGuide.[Δ] This integration needs to be set up by each individual advisor.

Total estimated time: ~1-2 days

Step 1: Enable the Connection within MGP

This is a one-time process per advisor at your firm.

1. Log in to your advisor account at MoneyGuide.com.
2. In the center of the screen, click on "User Options" within the Admin module.
3. Next, click on "Partner Options" in the left navigation. Scroll down to find "Flourish."
4. Select "Yes" next to **Allow Flourish** (this change will automatically save).
5. Scroll to the top of the screen and click on "Main Menu."
6. Next, click on "Options" in the top navigation and select "Request Flourish Authorization." This will open a new tab.
7. Log in to your Flourish advisor account.
8. Once logged in, you will be redirected to authorize the integration. Click "Authorize." Once successfully authorized, you can close the tab.



ENVESTNET
MoneyGuide
Options
Support
Help
Logout
Main Menu
Welcome to MoneyGuidePlatform
START PLANNING
Tools
Admin
Envestnet Analytics
Financial Calculators
Monte Carlo Card Game
Prospecting Center
Client Marketing Tools
Questionnaires
User Options
User Account Status
Change Password
Addepar
Request Addepar Authorization
Flourish
Request Flourish Authorization
AdvicePay
Launch AdvicePay
Healthpilot
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College Funding Solutions
CFS Signon
Envestnet Analytics
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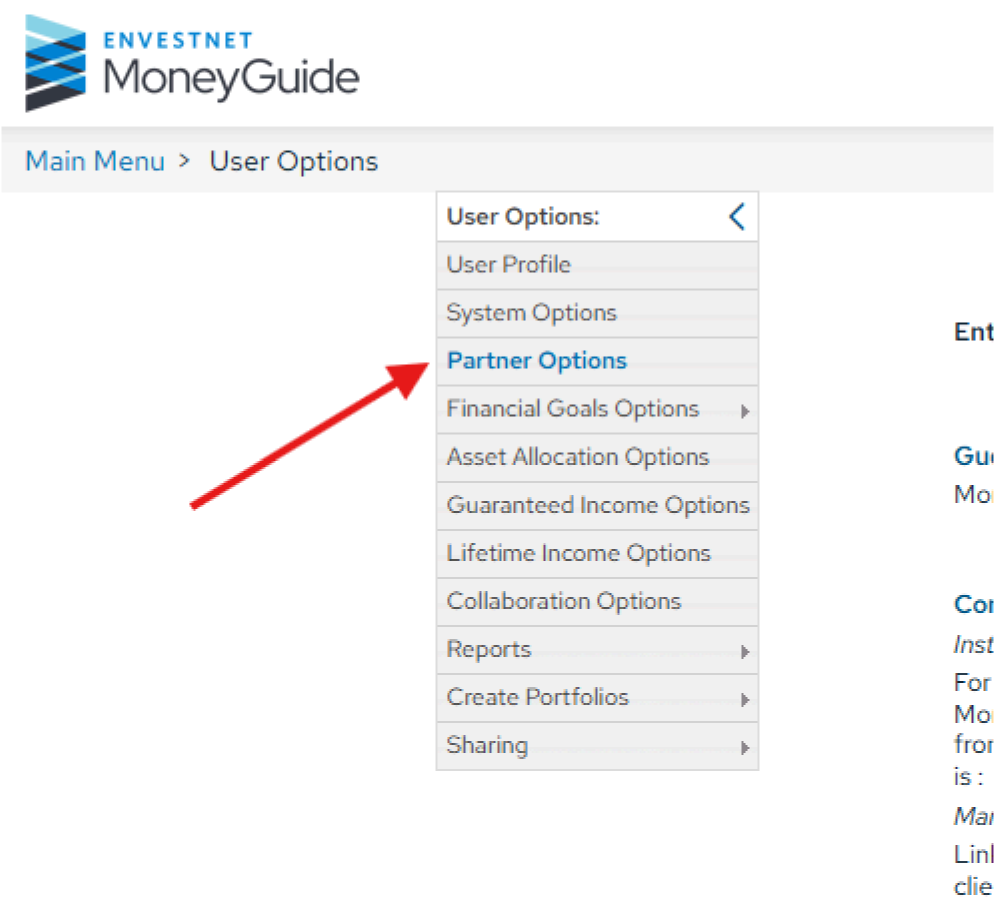
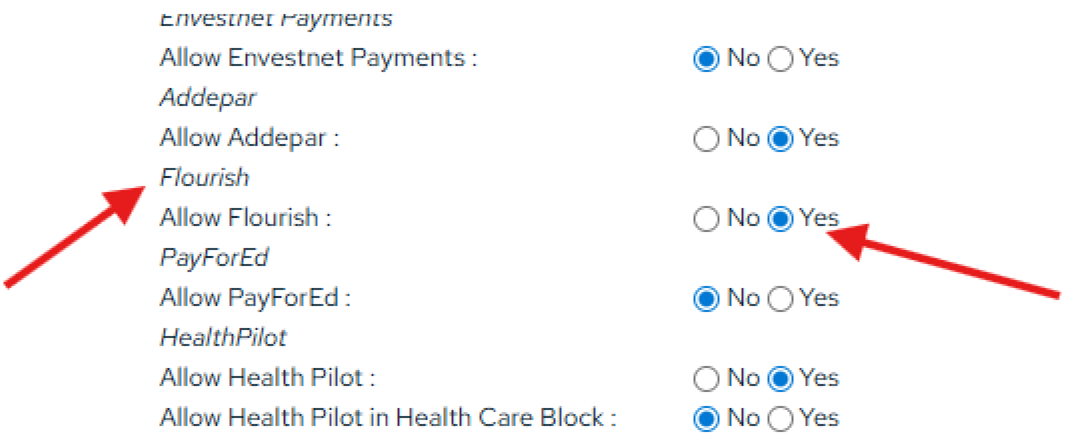
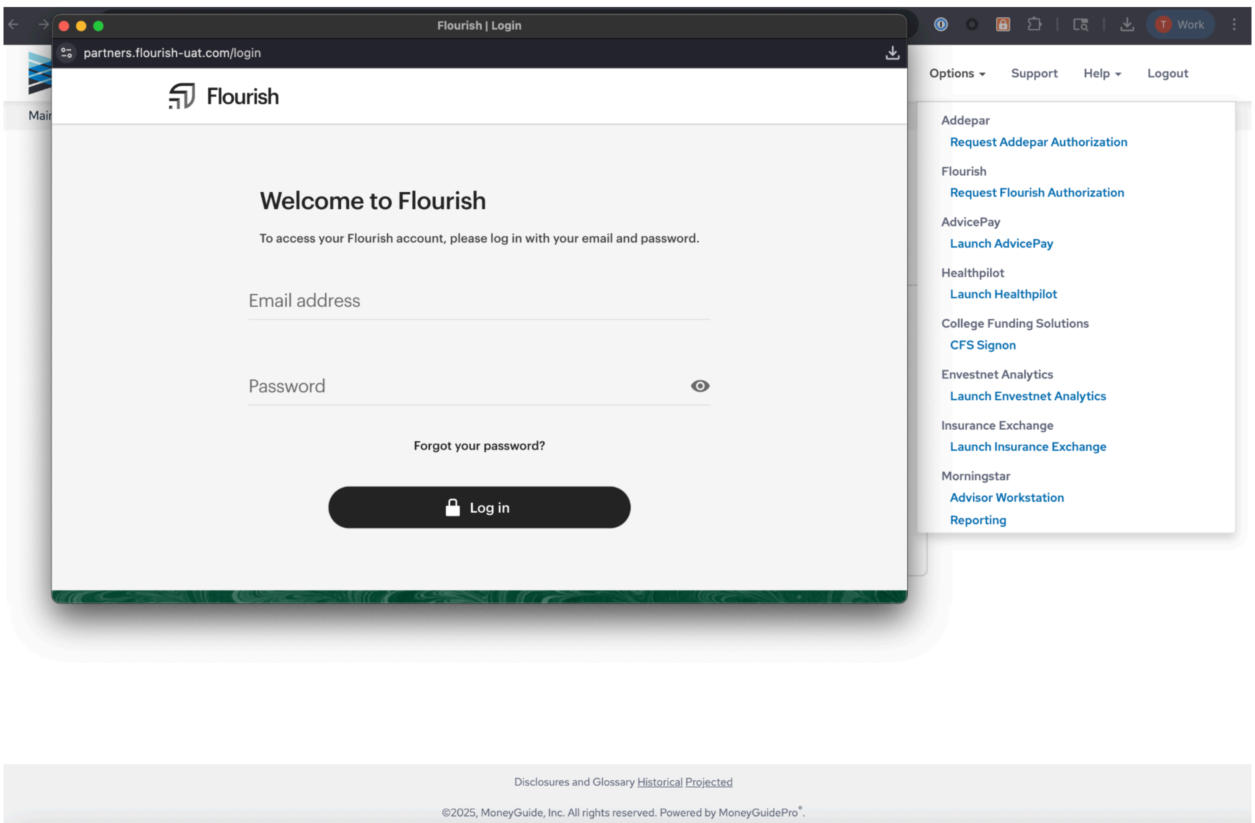
Morningstar
Advisor Workstation
Reporting



ENVESTNET
MoneyGuide
Main Menu > User Options
User Options:
User Profile
System Options
Partner Options
Financial Goals Options
Asset Allocation Options
Guaranteed Income Options
Lifetime Income Options
Collaboration Options
Reports
Create Portfolios
Sharing





Step 2: Add the Flourish advisor connection within MoneyGuide.

This process needs to be completed for each client.

1. If you are not already logged into MoneyGuide, log in.
2. Click on “Start Planning” within the main menu.

3. Select “List All Clients” at the bottom of the screen to view all.

4. To establish a connection, select the client whose Flourish Cash information you would like to view within MoneyGuide. Once selected:

   a. Click “Manage Integrations.”

   b. Click “Flourish” within the Integrations page.

   c. Enter the client’s email address that is associated with their Flourish account. Click “**Search**.”

      i. Note: To easily view client email addresses within Flourish, log in to your Flourish account.

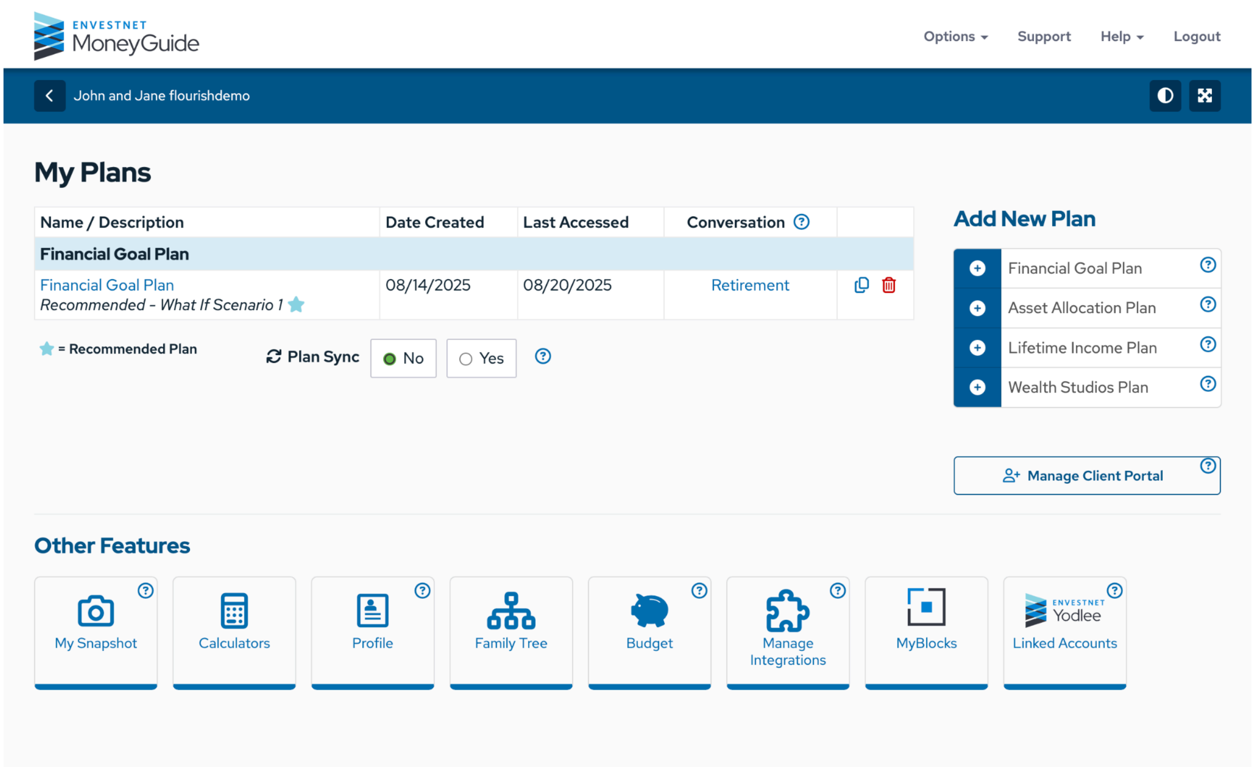
      ii. Click on “Clients” within the navigation bar.

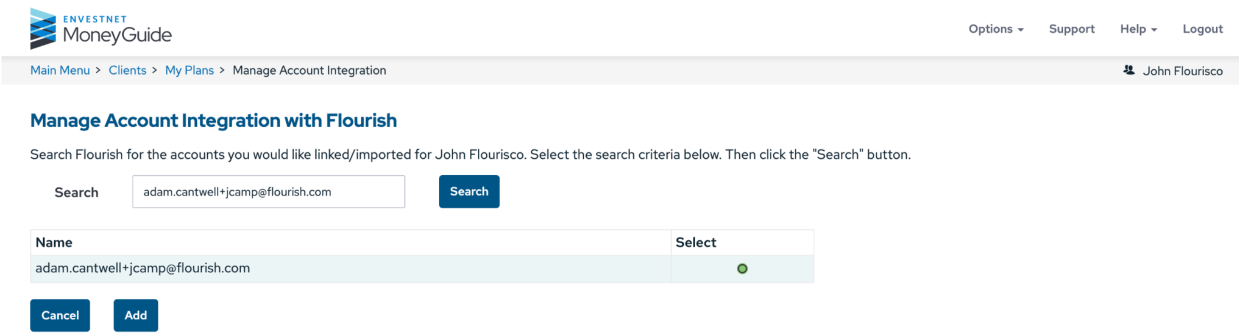
      iii. Click on the **downward facing arrow** ( ) that appears above the Clients table to download a .CSV containing all of your client account information.

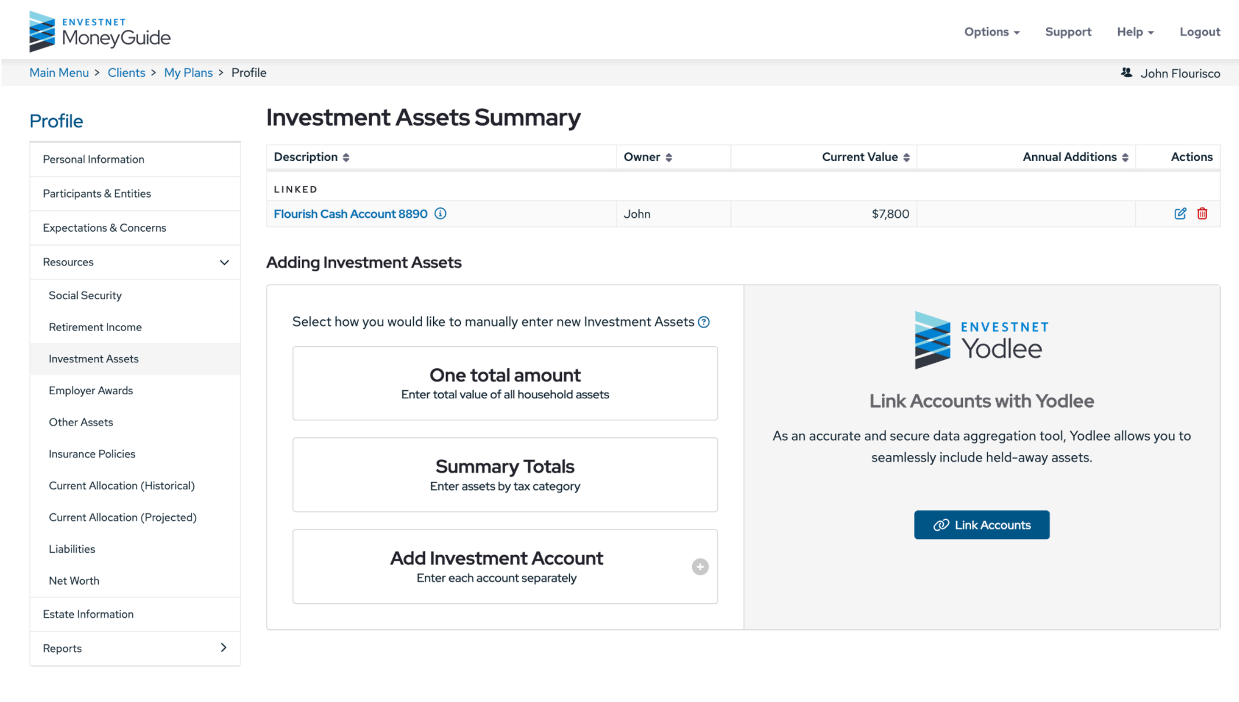
      iv. Open the downloaded file. The column named “Household Primary User Email” lists the email addresses associated with each of your clients.

   d. The client should appear in the search results. Click “Select,” then click “Add,” and then click “Done.”

   e. Once you see the connection was successfully established, click “Done.”







You're all set! The client's Flourish account(s) will now appear on the client's profile in MoneyGuide, and the balances will automatically update daily.

Questions / Support

For any other questions, please reach out to support@flourish.com.

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.

∆ An advisor's ability to view client account information is subject to applicable privacy laws and clients' consent to such sharing.

† A Flourish Cash account is a brokerage account 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. The cash balance in a Flourish Cash account will be swept from the brokerage account to deposit account(s) at one or more third-party Program Banks that have agreed to accept deposits from customers of Flourish Financial LLC. The accounts at Program Banks will pay a variable rate of interest.