

# Flourish + MoneyGuide Data-Feed Connection Guide

The Flourish + MoneyGuide direct custodial integration allows advisors to seamlessly incorporate clients' Flourish Cash<sup>+</sup> balances into MoneyGuide.<sup>Δ</sup> 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.




Welcome to **MoneyGuidePlatform**

**START PLANNING >**

Tools

-  Envestnet Analytics
-  Financial Calculators
-  Monte Carlo Card Game
-  Prospecting Center
-  Client Marketing Tools  
Questionnaires

Admin

-  User Options
-  User Account Status
-  Change Password

-  Order
-  Support
-  Message

- Addepar
  - [Request Addepar Authorization](#)
- Flourish
  - [Request Flourish Authorization](#)
- AdvicePay
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- Healthpilot
  - [Launch Healthpilot](#)
- College Funding Solutions
  - [CFS Signon](#)
- Envestnet Analytics
  - [Launch Envestnet Analytics](#)
- Insurance Exchange
  - [Launch Insurance Exchange](#)
- Morningstar
  - [Advisor Workstation](#)
  - [Reporting](#)

- 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 ▶

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Envestnet Payments	
Allow Envestnet Payments :	<input checked="" type="radio"/> No <input type="radio"/> Yes
Addepar	
Allow Addepar :	<input type="radio"/> No <input checked="" type="radio"/> Yes
Flourish	
Allow Flourish :	<input type="radio"/> No <input checked="" type="radio"/> Yes
PayForEd	
Allow PayForEd :	<input checked="" type="radio"/> No <input type="radio"/> Yes
HealthPilot	
Allow Health Pilot :	<input type="radio"/> No <input checked="" type="radio"/> Yes
Allow Health Pilot in Health Care Block :	<input checked="" type="radio"/> No <input type="radio"/> Yes

The screenshot shows a web browser window with the URL `partners.flourish-uat.com/login`. The page title is "Flourish | Login". The main content area displays the "Welcome to Flourish" message and a login form with fields for "Email address" and "Password". Below the password field is a "Forgot your password?" link and a "Log in" button. On the right side, there is a sidebar menu with the following items:


- Options
- Support
- Help
- Logout
- Addepar
  - [Request Addepar Authorization](#)
- Flourish
  - [Request Flourish Authorization](#)
- AdvicePay
  - [Launch AdvicePay](#)
- Healthpilot
  - [Launch Healthpilot](#)
- College Funding Solutions
  - [CFS Signon](#)
- Envestnet Analytics
  - [Launch Envestnet Analytics](#)
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  - [Launch Insurance Exchange](#)
- Morningstar
  - [Advisor Workstation](#)
  - [Reporting](#)


At the bottom of the page, there is a footer with the text: "Disclosures and Glossary [Historical Projected](#)" and "©2025, MoneyGuide, Inc. All rights reserved. Powered by MoneyGuidePro®."

## **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.”





Options ▾ Support Help ▾ Logout

 John and Jane flourishdemo
 

### My Plans

Name / Description	Date Created	Last Accessed	Conversation ?	
<b>Financial Goal Plan</b>				
Financial Goal Plan Recommended - What If Scenario 1 ★	08/14/2025	08/20/2025	Retirement	 

★ = Recommended Plan
 Plan Sync
 

☒ No
 ☐ Yes
 ?

### Add New Plan

+

 Financial Goal Plan ?

+


 Asset Allocation Plan ?

+


 Lifetime Income Plan ?


+


 Wealth Studios Plan ?


 Manage Client Portal ?


### Other Features


 ?  
My Snapshot


 ?  
Calculators


 ?  
Profile

 ?  
Family Tree

 ?  
Budget

 ?  
Manage Integrations

 ?  
MyBlocks

 ?  
Linked Accounts

## Manage Account Integration with Flourish

Search Flourish for the accounts you would like linked/imported for John Flourisco. Select the search criteria below. Then click the "Search" button.

Search
Search

Name	Select
adam.cantwell+jcamp@flourish.com	<input checked="" type="checkbox"/>

Cancel
Add

## Profile

Personal Information
Participants & Entities
Expectations & Concerns
Resources ▾
Social Security
Retirement Income
Investment Assets
Employer Awards
Other Assets
Insurance Policies
Current Allocation (Historical)
Current Allocation (Projected)
Liabilities
Net Worth
Estate Information
Reports >

## Investment Assets Summary

Description ⓘ	Owner ⓘ	Current Value ⓘ	Annual Additions ⓘ	Actions
LINKED				
Flourish Cash Account 8890 ⓘ	John	\$7,800		<a href="#">✎</a> <a href="#">✖</a>

## Adding Investment Assets

Select how you would like to manually enter new Investment Assets ⓘ

One total amount  
Enter total value of all household assets

Summary Totals  
Enter assets by tax category

Add Investment Account ⓘ  
Enter each account separately



## Link Accounts with Yodlee

As an accurate and secure data aggregation tool, Yodlee allows you to seamlessly include held-away assets.

[Link Accounts](#)

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](mailto:support@flourish.com).

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

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