Flourish + RightCapital Integration Guide

Our direct custodial integration allows you to seamlessly incorporate your clients' Flourish balances into RightCapital.[△] Once you set up the Flourish integration, the following data will display in RightCapital:

- Flourish Cash account balances, but not transaction-level information.
- Flourish Annuities data: annuity contract data and values

Total estimated timeline: 2 - 3 business days

Step 1: Request the integration

Request the integration by emailing integrations@flourish.com. Please include the name and individual email address associated with the RightCapital profile for all advisors for which the integration should be enabled.

The email request should come from one of your firm's Flourish "Executives".

Flourish Support will confirm receipt of your request and begin setting up the integration.

Step 2: Configuration

Flourish Support will email RightCapital to let them know your firm has enabled the integration. From there, it typically takes 1-2 business days for RightCapital to finalize the data feed on their end. Once this occurs, a RightCapital representative will reach out to confirm the set up and attach instructions for use.

Step 3: Completion

Once Flourish data is flowing into RightCapital, you can link Flourish accounts in RightCapital within the Client Plan by:

1. Navigate to "Profile"

2. Select “Net Worth” > “Link Account” > ‘Flourish’ from the dropdown menu
3. Search for the account number or name of the account owner and then select the accounts (using check boxes in the “Link” column) to assign to the current client, and clicking save
4. Flourish accounts will then appear under the “Bank and Investment” sections on the left side of the “Net Worth” screen in RightCapital. From this point forward, Flourish data will flow into RightCapital

Questions / Support

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

- RightCapital: support@rightcapital.com
- Flourish: integrations@flourish.com