

Flourish + AdvisorEngine Integration Guide

Our direct custodial integration allows you to seamlessly incorporate your clients' Flourish balances into AdvisorEngine.^A Once you set up the Flourish integration, the following data will display in AdvisorEngine: Flourish Cash[†] account, account owner, advisor, and transactions data.

Total estimated timeline: 2 - 3 business days

Instructions

To begin sending files to AdvisorEngine, please request the integration setup directly with Flourish by emailing integrations@flourish.com.

The request must be sent by one of the firm's Flourish "Executives" and should include:

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

Flourish Support will confirm receipt of your request and notify you once the integration has been enabled.

Flourish will also notify the AdvisorEngine team. From there, AdvisorEngine will handle all communications with your firm regarding setup on the AdvisorEngine platform.

Questions / Support

For any questions or support issues regarding the Flourish → AdvisorEngine feed, please reach out to the Flourish integrations team at: integrations@flourish.com.

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. Where applicable, Flourish Financial LLC. Flourish Lending is offered by SoraFinance, Inc. (d/b/a Flourish Lending), a licensed mortgage broker (NMLS #2355841). SoraFinance, Inc. is not a lender. To verify SoraFinance, Inc., visit NMLS Consumer Access. The Flourish entities mentioned above are all wholly-owned subsidiaries of Flourish Holding Company LLC. Please review the Legal section of our website for more information and account terms. 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. © 2026 Flourish. All rights reserved.



△ 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.