Flourish

Flourish + Advyzon Integration Guide

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

- Flourish Cash[†] account balances, but not transaction-level information

Total estimated timeline: 5 - 6 business days

Step 1: Request the integration

Request the integration by emailing integrations@flourish.com. Please include the following information:

1. Firm name
2. Primary contact name
3. Primary contact email
4. Primary contact phone number

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

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

Step 2: Advisor Rep ID Configuration

Once the integration is enabled, Flourish will notify the Advyzon data team. This is a self-service process within Advyzon. To ensure security, firm admins must map their own Advisor Rep IDs.

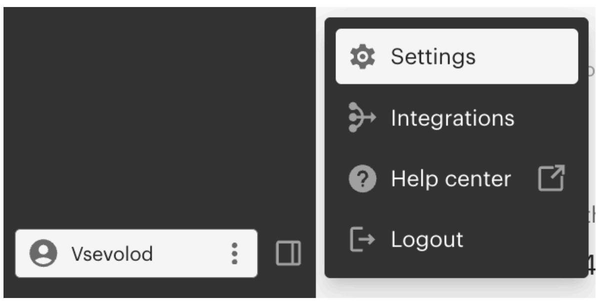
Once submitted, your Firm Admin must set up the Rep ID to Advisor mapping using the System Administration app in Advyzon:

1. Navigate to the Rep Codes tab
2. Select +New
3. Select Flourish in the Custodian field

4. Enter the Flourish Advisor Rep ID (Advisors can find these in their Flourish settings page)
5. Assign the Advisor and click Save
6. Repeat for each Advisor Rep ID

Note that if you are enabling multiple advisors at once, you can reach out to advisor@flourish.com to request a list of Advisor Rep IDs.

<u>Flourish Advisor Settings</u>
In the Flourish advisor portal, you can find your Rep ID by navigating to the Settings page and scrolling down to "Your Rep ID".



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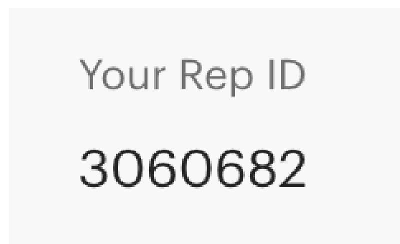

After the Advisor Rep IDs are mapped, the household configuration is automated. Advyzon uses the client and contact data from Flourish to automatically link (or create) the appropriate contact/account owner and roll them into their respective households. Mapping your Advisor Rep IDs in Step 2 ensures that data is visible only to the appropriate advisors.

Note that Flourish accounts are imported as Investment Accounts to ensure that the accounts maintain full history and performance data. In the uncommon event that contact or ownership data is missing, accounts may be placed in the "Accounts Needing Review" section for manual assignment.

Questions / Support

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

† 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.