

Flourish + Orion Onboarding Guide

Our direct custodial integration allows you to seamlessly incorporate your clients' Flourish balances into Orion.[^]

Total estimated timeline: 5 - 8 business days

Step 1: Request the integration

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

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

We will confirm receipt of your request and confirm once the integration has been enabled on our end.

Please note: the email request should come from one of your firm's Flourish "Executives"

Step 2: Configuration

We will email Orion to let them know your firm has enabled the integration. From there, it typically takes ~5 days for Orion to finalize the data feed on their end. Once this occurs, an Orion representative will reach out to validate and configure the data in your system. If you'd like to expedite the process, you can email Orion at sme-datarecon@orion.com to follow-up on the integration.

Orion may request your "Firm ID," as well as the Flourish account numbers of a handful of your clients for verification purposes. We typically include the "Firm ID" in the confirmation email we sent to Orion. Account numbers can be found by navigating to the "Clients" tab and clicking on the download icon (↓).

Step 3: Completion

Once Flourish data is flowing into Orion, you will see a notice of new account data within Orion. You can also search for Flourish accounts in Orion via the client name and/or account number. From this point forward, Flourish data will flow into Orion in the same manner as any other custodial integration, allowing advisors to pull data into client households.

Questions / Support

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

- Orion: sme-datarecon@orion.com
- Flourish: integrations@flourish.com

^Δ *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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