

Advisor Teams Guide

Advisor Teams brings a new way for advisors to collaborate within the Flourish platform. This functionality allows advisors to organize themselves into an infinite number of custom groups, whether based on working team, office location, or functional role, and easily share visibility of clients at the Team level.

Every advisor on a Team will be able to view all clients assigned to that Team, even if they aren't individually assigned to the client themselves. In addition, both advisors and clients can be associated with multiple Teams at one time, making it easy to collaborate within Flourish as you do within your firm.

This highly-requested feature may be especially useful for:

- RIAs with multiple offices, grouping advisors in each location in a team (e.g. "NY Office, "Cincinnati Office"), who want to share visibility of all clients with their team
- Advisors who work in consistent team structures, often pairing lead advisor(s) with junior advisors or client services staff (e.g., Diamond Teams)
- Firms that group advisors by role (e.g., the "Client Services" team could be assigned to every household)

This guide walks through Teams from the perspective of both "Advisors" and "Executives."

- 1.) [Click here if you are an Advisor](#)
- 2.) [Click here if you are a Flourish 'Executive'](#)

For Advisors

Inviting clients: assigning Team(s) during the invite process

- 1.) Navigate to the “Invite” tab
- 2.) Enter the client’s name and email
- 3.) Expand the “Advisors and teams” section to view or adjust assigned Teams
 - a.) *Please note: new clients will be assigned to (a) you and (b) any Teams you are on by default. You can add additional Advisor and Team assignment at this stage, or can remove Advisor or Team assignments by clicking the “X” button next to the relevant Team. You cannot remove yourself from the assignment at the time of invite.*
- 4.) Click “Continue” to continue the invitation process

Viewing all clients assigned to a Team

Option 1: From the “Teams” tab

- 1.) Click “Manage” under the desired Team
- 2.) Click “Go to client list” to see the clients currently assigned to this Team
 - a.) *Please note: you can only view Teams that you are on and clients assigned to these Teams*

Option 2: From the “Clients” tab

- 1.) Click the ‘Filters’ button (the downward facing triangle in the center-right of the screen)
- 2.) Under the “Teams” filter, select a team from the dropdown or search for a team using the typeahead search
- 3.) The filter will automatically apply.

Assigning existing clients to a Team

- 1.) Navigate to the “Clients” tab
 - a.) To assign one or more clients to a Team
 - i.) Select the checkbox(es) next to the desired client(s) name
 - ii.) Click the “Actions” button and then select “Manage advisors and teams”
 - iii.) Select the Team(s) you’d like to assign to the selected client(s) by checking the box next to the Team.
 - (1) You can also search for the desired Team by name
 - iv.) Click “Assign” to complete the process
 - b.) To assign a single client to a Team from Household Settings
 - i.) Click “Manage” under the desired client’s name
 - ii.) Navigate to the “Household settings” tab
 - iii.) Scroll down to the “Advisors and Teams” section
 - iv.) To assign this client to an additional Team, select the desired Team from the “Select advisor(s) or team(s) to assign” section and click the “Assign” button

Assigning other advisors to a Team you are on

- 1.) Navigate to the “Teams” tab
- 2.) Click “Manage” under the desired Team
- 3.) Select the desired advisor(s) from the “Select advisor(s) to assign” section
- 4.) Click the “Assign” button

Removing yourself from a Team

- 1.) From the “Teams” tab → Individual “Teams” page
 - a.) Click “Manage” under the desired Team
 - b.) Scroll down to the “Currently assigned advisors” section
 - c.) Click the ‘trash can’ icon next to your name
- 2.) From the “Teams” tab
 - a.) Click the checkbox next to the desired Team
 - b.) Click the “Actions” button and then click “Unassign yourself from the selected team(s)”

For Executives

Creating a new Team

Option 1: From the “Teams” tab

- 1.) Click the “+ Add team” button
- 2.) Enter a “Team name”
 - a.) *Optional - enter an “External reference ID.” For example, you may want to enter a G-Code or other external identifier for the team.*
- 3.) Assign advisors to this Team by selecting the desired advisor in the “Advisor name” section and clicking “Create team”.
 - a.) Note: You can add multiple advisors to the Team at the same time
 - b.) Selecting “Assign below advisors’ clients to this Team” will automatically assign all of the clients that are currently assigned to the selected advisor(s) to the Team when it is created
- 4.) When prompted, you can optionally assign clients to the Team by clicking “Assign clients,” which will take you to the client list – assigning clients to an existing Team is covered in the next section. Note that this can be completed later.
- 5.) Click “Done” to create the Team

Option 2: From the “Advisors” tab

- 1.) Select the advisors you’d like to include in the new Team by selecting the checkbox next to their name
- 2.) Click “Actions” and select “Create team with selected advisor(s)”
- 3.) Follow the steps from the prior section above but disregard ‘Step 4’

Inviting clients: assigning Team(s) during the invite process

- 1.) Navigate to the “Invite” tab
- 2.) Enter the client’s name and email
- 3.) Expand the “Advisors and teams” section to view or adjust assigned Teams
 - a.) *Please note: new clients will be assigned to (a) you and (b) any Teams you are on by default. You can add additional Advisor and Team assignment at this stage, or can remove Advisor or Team assignments by clicking the “X” button next to the relevant Team. You cannot remove yourself from the assignment at the time of invite.*
- 4.) Click “Continue” to continue the invitation process

Viewing all clients assigned to a Team

Option 1: From the “Teams” tab

- 1.) Click “Manage” under the desired Team
- 2.) Click “Go to client list” to see the clients currently assigned to this Team
 - a.) *Please note: you can only view Teams that you are on and clients assigned to these Teams*

Option 2: From the “Clients” tab

- 1.) Click the ‘Filters’ button (the downward facing triangle in the center-right of the screen)
- 2.) Under the “Teams” filter, select a team from the dropdown or search for a team using the typeahead search
- 3.) The filter will automatically apply.

Assigning (or unassigning) existing clients to a Team

- 1.) Navigate to the “Clients” tab
 - c.) To assign (or unassign) one or more clients to (or from) a Team
 - i.) Select the checkbox(es) next to the desired client(s) name
 - ii.) Click the “Actions” button and then select “Manage advisors and teams”
 - iii.) Select the Team(s) you’d like to assign to (or unassign) the selected client(s) to (or from) by checking the box next to the Team.
 - (1) You can also search for the desired Team by name
 - iv.) Click “Assign” (Or “Unassign”) to complete the process
 - d.) To assign (or unassign) a single client to a Team from Household Settings
 - i.) Click “Manage” under the desired client’s name
 - ii.) Navigate to the “Household settings” tab
 - iii.) Scroll down to the “Advisors and Teams” section
 - (1) To assign this client to an additional Team, select the desired Team from the “Select advisor(s) or team(s) to assign” section and click the “Assign” button
 - (2) To unassign this client from a currently assigned Team, click the ‘trash can’ icon next to the desired Team under the ‘Currently assigned’ section

Assigning (or unassign) advisors to (or from) a Team

- 1.) From the “Teams” tab
 - a.) Navigate to the “Teams” tab
 - b.) Click “Manage” under the desired Team
 - c.) Under “Select advisor(s) to assign” section
 - i.) To assign: Select the desired advisor(s) from the “Select advisor(s) to assign” section, then click the “Assign” button
 - (1) *Please note: checking the “Assign below advisors’ clients to this Team” will assign all the clients directly assigned to the selected advisor(s) in the below section to this Team*
 - ii.) To unassign: click the ‘trash can’ icon next to the desired advisor(s) under the ‘Currently assigned advisors’ section
- 2.) From the “Advisors” tab
 - a.) To assign (or unassign) one or more advisors to (or from) a Team
 - i.) Select the desired advisor(s) by clicking the checkbox next to their name

- ii.) Click “Actions” and then “Manage team assignments”
- iii.) Select the Team(s) you’d like to assign (or unassign) the selected advisor(s) to (or from) by checking the box next to the Team(s)
- iv.) Click “Assign” (or “Unassign”) to action and complete the process
- b.) To assign (or unassign) a single advisor to (or from) a Team
 - i.) Click “Manage” under the desired advisor’s name
 - ii.) Scroll down to the “Teams” section – this is also where you can see the Teams this advisor is assigned to
 - iii.) To assign this advisor to a (additional) Team, select the desired Team from the “Select team(s) to assign” section and click the “Assign” button
 - (1) *Please note: checking the “Assign Advisor Name’s clients to the selected team” will assign all the clients directly assigned to this advisor to the selected Team*
 - iv.) To unassign this advisor from a currently assigned Team, click the ‘trash can’ icon next to the desired Team under the ‘Currently assigned teams’ section

Questions / Support

For any questions, please reach out to advisor@flourish.com.

Flourish is an online platform through which investors can access financial services and products. 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](#). Flourish Crypto is offered by Paxos Trust Company, LLC, a New York limited purpose trust company regulated by the New York Department of Financial Services that provides custody and execution services for the Flourish Crypto accounts, and Flourish Digital Assets LLC, registered in New York as a commodity broker-dealer and provides website and other services and support for Flourish Crypto accounts. Paxos is not an affiliate of Flourish. Flourish Annuities refers generally to the annuity platform operated by Flourish Technologies LLC, where applicable, and to Flourish Insurance Agency LLC in its capacity as a licensed insurance producer providing insurance services related to such platform. Flourish Insurance Agency LLC does business in California under the name Flourish Digital Insurance Agency. An annuity is an insurance contract. Annuities shown on the platform are sold through Flourish Insurance Agency LLC, a licensed insurance producer, with offices in Jersey City, New Jersey, and are issued by one or more approved licensed life insurance companies. The Flourish entities mentioned above are affiliates. Flourish Cash, Flourish Crypto, and Flourish Annuities accounts are separate accounts and only assets in Flourish Cash accounts may be eligible for protection by the FDIC or SIPC. Please review the [Legal](#) section of our website, and the disclosures provided with each Flourish service or product, for further information. If you were introduced or invited to Flourish by an investment advisor or other third party, please be aware that, unless otherwise disclosed to you, they are not affiliated with any Flourish entity. 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. © 2024 Flourish. All rights reserved.