

Flourish + Black Diamond Onboarding Guide

Our direct custodial integration allows you to seamlessly incorporate your clients' Flourish balances into SS&C Advent Black Diamond.

Total estimated timeline: ~1-3 business days

Step 1: Request the integration from Flourish

Email us at integrations@flourish.com to request that the integration be enabled for your firm. *Please note: this request should come from your firm's Flourish "Executives"*

Step 2: Fill out Authorization or Direction Letters

Download the Authorization and/or Direction Letters from your Advent/Black Diamond Portal:

1. Under the 'Data Management' section click "ACD Accounts"
2. Click "Add Authorization" near the top of the page
3. Select the Authorization Level
 - a. Select '**Non-discretionary**' to generate an Authorization Letter. **An Authorization Letter is required for all Flourish Cash accounts** and some Flourish Crypto accounts. You must return an Authorization Letter signed by the advisor and your end-client for each account
 - b. Select '**Discretionary**' to generate a Direction Letter. This is only relevant for discretionary Flourish Crypto accounts and only needs to be signed by an advisor
4. Click "Download Authorization Letter" or "Download Direction Letter" to download the letter

Complete the required information in the letter and send it to the appropriate parties for signature. A few important notes:

1. When completing the letters, please note that "Client" refers to your advisory firm, while "Investor" refers to your end-client

2. The client Flourish account number can be found in the Advisor Portal by downloading your client list. To download your client list: log in at Flourish.com and click on the download icon (↓) on the “Clients” page to download a report. The Flourish account number can also be found on the client’s account statement if one is available
3. These forms may be completed via electronic or wet signature
4. A letter must be completed for each client you wish to enable the integration for

Step 3: Return the Authorization/Direction Letter to Flourish

1. Once signed, upload the Authorization/Direction Letter to Flourish through this secure file sharing link: <https://flourish.sendsafely.com/dropzone/documents/>
2. Email support@flourish.com to let us know that you’ve uploaded the letter. Please include the account number in the email for the client account that is being authorized

Step 4: Return the Authorization/Direction letter to Black Diamond

Upload the signed Authorization and/or Direction Letters to your Advent/Black Diamond Portal:

1. Under the ‘Data Management’ section click “ACD Accounts”
2. Click “Add Authorization” near the top of the page
3. In the ‘Account Provider’ section, select “Flourish Financial LLC”
4. Select the Authorization Level
 - a. *Select ‘Non-discretionary’ when uploading Authorization Letters*
 - b. *Select ‘Discretionary’ when uploading Direction Letters*
5. In the ‘Accounts’ section, enter the Flourish Account Number(s) from the letter
6. Add the document to the ‘Letter’ upload tool
7. Click “Save” on the upper right of the page

Step 5: Data becomes available within Advent/Black Diamond

Once you've returned the completed form(s) and emailed Flourish, we will whitelist the account(s) and the data will flow into your firm's Black Diamond portal like any other integration

Questions / Support

- For any Flourish questions, please reach out to integrations@flourish.com
- Existing Advent clients can contact Advent by submitting an [Advent's Community Online Support](#) or via phone call
- Black Diamond users can similarly submit cases via Black Diamond's case management portal or by contacting their Client Advocate

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