

Flourish + Investnet | Tamarac

Onboarding Guide

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

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 Investnet | Tamarac to let them know your firm has enabled the integration. From there, it typically takes ~5 days for Investnet | Tamarac to finalize the data feed on their end. Once this occurs, an Investnet representative will reach out to validate and configure the data in your system.

Investnet 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 Investnet | Tamarac. 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 Tamarac, you will see a notice of new account data in your daily email from Envestnet | Tamarac. From this point forward, Flourish data will flow into Envestnet | Tamarac 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 → Tamarac feed, contact the following email addresses:

- Envestnet | Tamarac: tamaracsupport@envestnet.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.*

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. Flourish Financial LLC and Flourish Digital Assets LLC are affiliates, but are not affiliates of Paxos. 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. © 2023 Flourish. All rights reserved.