

Flourish + Redtail Integration Guide

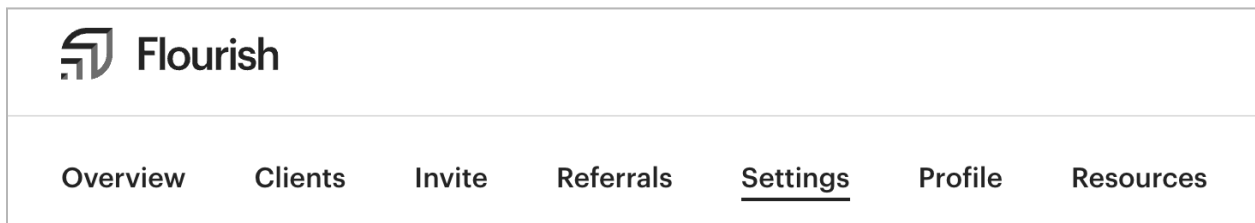
The Redtail + Flourish integration gives advisors the ability to quickly and easily pre-fill end-client applications and then invite clients with the press of a button within Flourish.

Total estimated timeline: ~5 minutes

Step 1: Log into Flourish

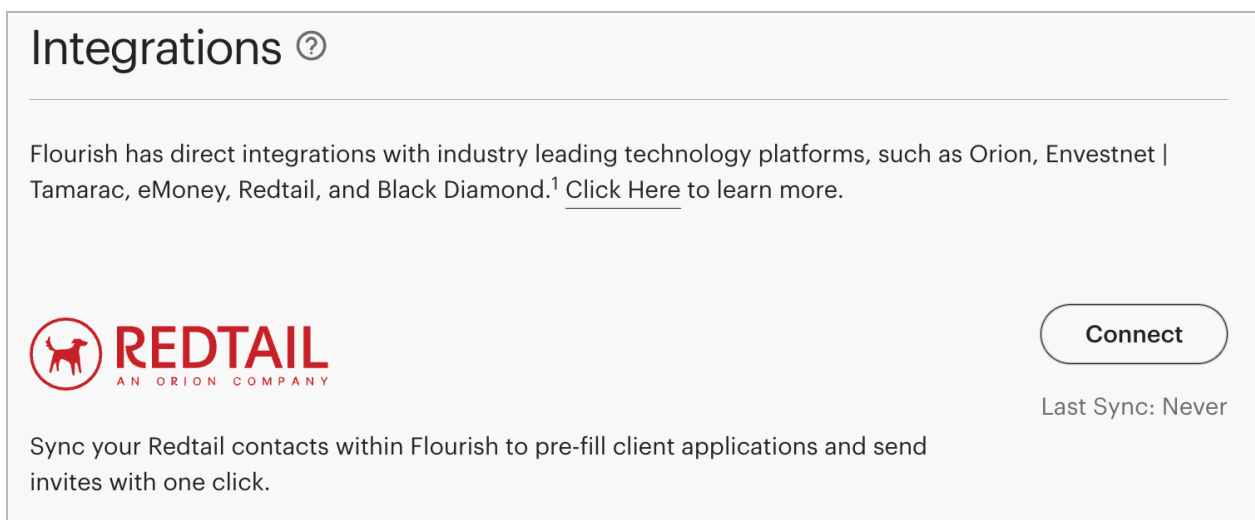
Navigate to Flourish.com and log in using your advisor credentials.

Click **"Settings"** at the top of the Advisor Portal.



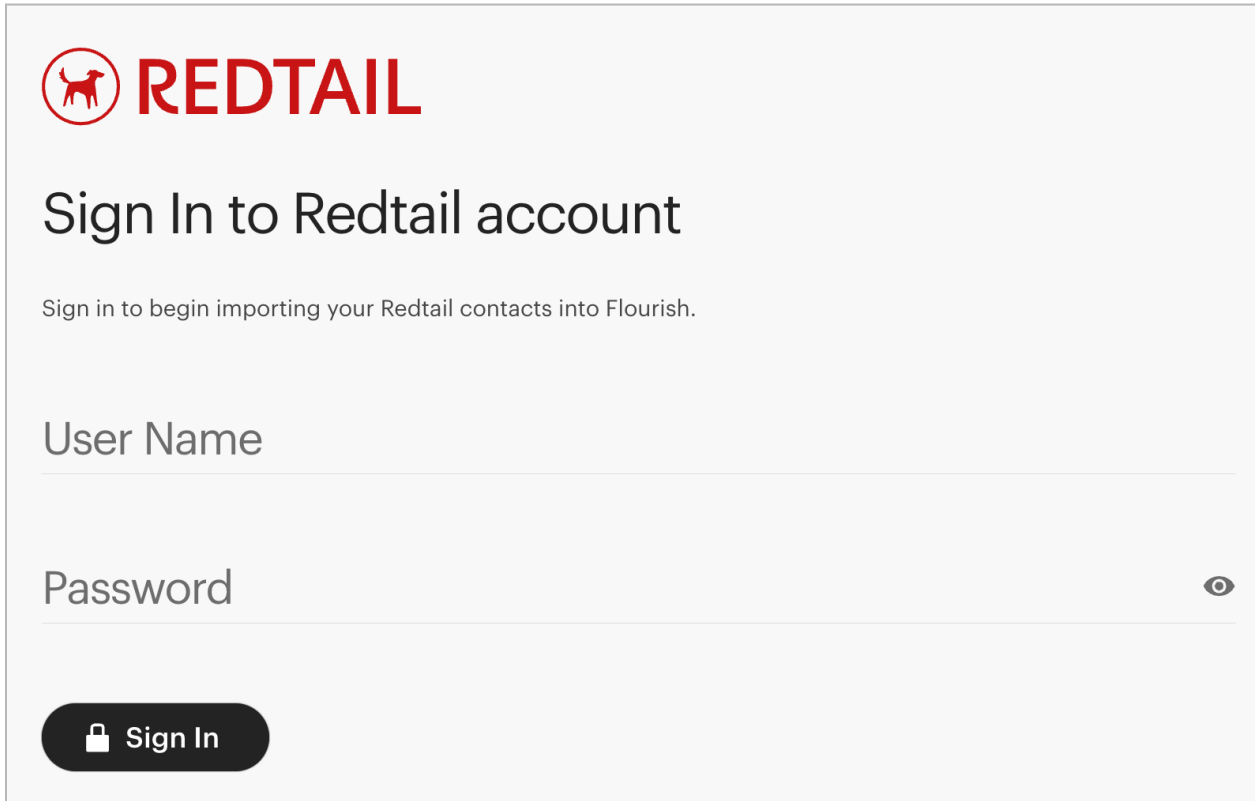
Step 2: Link the Integration

Scroll down to **"Integrations"** and click **"Connect"** next to Redtail.



In the pop-up window, enter your Redtail username and password and click **“Sign In.”**

- Please note: it may take a few minutes to authenticate your account.




The screenshot shows a sign-in form for Redtail. At the top left is the Redtail logo, which consists of a red circle containing a silhouette of a dog, followed by the word "REDTAIL" in red, uppercase letters. Below the logo is the heading "Sign In to Redtail account" in a large, black, sans-serif font. Underneath the heading is a smaller line of text: "Sign in to begin importing your Redtail contacts into Flourish." The form contains two input fields: "User Name" and "Password". The "Password" field has a small eye icon on the right side, indicating a toggle for password visibility. At the bottom left of the form is a dark, rounded button with a white padlock icon and the text "Sign In".

Once the connection is established, you will see a green check mark on the Settings page indicating that the integration is live. To invite your contacts to Flourish, simply click **“here”** on the Settings page, or click on the **“Invite”** tab.

- Note: you can re-sync your data at any time on the Integrations page

Integrations ?


Flourish has direct integrations with industry leading technology platforms, such as Orion, Envestnet | Tamarac, eMoney, Redtail, and Black Diamond.¹ [Click Here](#) to learn more.

 **REDTAIL**
AN ORION COMPANY

[Sync Now](#)


Sync your Redtail contacts within Flourish to pre-fill client applications and send invites with one click.

Last Sync: a few seconds ago

 Your integration is complete
Start inviting your Redtail contacts to Flourish [here](#).

Step 3: Prefilling Client Data & Sending Invites

On the “Invite” tab, select “**Redtail contact invite**” in the **Invitation Type dropdown**.

 **Flourish**

[Overview](#) [Clients](#) [Invite](#) [Referrals](#) [Settings](#) [Profile](#) [Resources](#)

Send invitations to Flourish


Invitation type

Redtail contact invite ▼

Last Sync: 7 minutes ago [Sync Now](#)

Once you've selected "Redtail contact invite," you can quickly and easily search for a specific client using the search bar in the center-left of the screen, or you can browse from your available Redtail contacts.

To invite a client, click "**Select**" next to their name.



[Overview](#) [Clients](#) [Invite](#) [Referrals](#) [Settings](#) [Profile](#) [Resources](#)

Send invitations to Flourish

Invitation type
Redtail contact invite ▼

Last Sync: 23 minutes ago [↻ Sync Now](#)

Contacts 83 results

Search 83 contacts

HOUSEHOLD	ACTIONS
Adrian Hilton	Invited
Solomon Informations	Select
Isidore Ingles	Select

In the pop-up screen, confirm your client's first name, last name, and email address, and select the appropriate product(s). From here, you have two options.

- If you click **"Invite"**, an invitation email will be immediately sent to the client and you can continue inviting additional clients to Flourish
- If you click **"Invite & apply,"** an invitation email will also immediately be sent to the client. You'll then have the opportunity to pre-fill the account application on your client's behalf based on data stored in Redtail.
 - You can learn more about [Advisor Account Initiation here](#).

Invitee first name
Jill



Invitee last name
Smithers

Invitee email address
jill.smithers@gmail.com

Add household partner ?

User(s) can send referrals ?

Products

<input checked="" type="checkbox"/>  Flourish Cash	<input type="checkbox"/>  Flourish Crypto
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Click 'Invite only' to send a Flourish invite to this person. Or click 'Invite & apply' to both send them an invite and prefill an account application which they can then review and submit.

Invite only **Invite & apply**

After clicking **"Invite & Apply,"** you'll have the opportunity to correct, update or fill out any missing application information. Once complete, click **"Send to client"** to send a second email to your client notifying them that you have initiated the application process.

Your client will be prompted to set a password, review the information you've submitted, and accept certain legal agreements in order to open the account.

Flourish Exit ×

First, we need to collect a few personal details about Jill.

Federal regulations require all financial institutions to collect some personal details about their customers in order to verify their identity. No credit check will be run and all information provided is protected by our bank-level security.

Personal information

First name: Middle name:

Last name:

Date of birth: Gender:

Mobile phone number:

Home phone number:

Other phone number:

Address line 1:

Address line 2:

City:

State: Zip code:

Use this as my mailing address

Social security number: ✓ ⓘ

Citizenship:

Certain financial industry affiliations

Is this person, their spouse, any immediate family member with whom they share a household, or any person controlling this account, employed by or associated with: a broker-dealer, stock exchange, exchange member firm or the Financial Industry Regulatory Authority (FINRA)?

Yes, this person has one of these affiliations.

That's it — you're done! Simply return to the "Invite" page in order to send additional invitations using the Flourish + Redtail integration.

Questions / Support

- For any Flourish questions or support, please reach out to integrations@flourish.com



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