

Flourish + Redtail Integration Guide

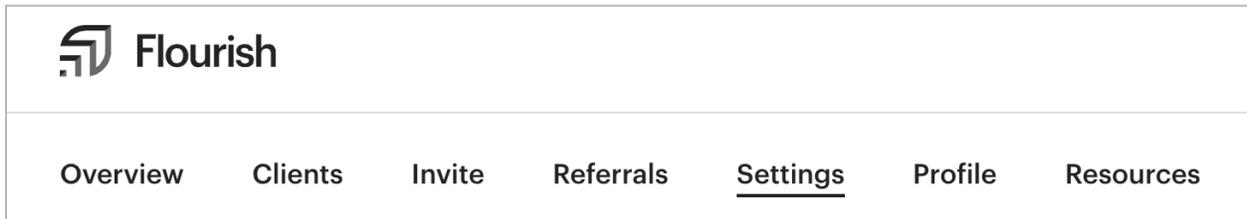
The Redtail + Flourish integration gives advisors the ability to quickly and easily pre-fill end-client applications and then invite clients with the press of a button within Flourish.

Total estimated timeline: ~5 minutes

Step 1: Log into Flourish

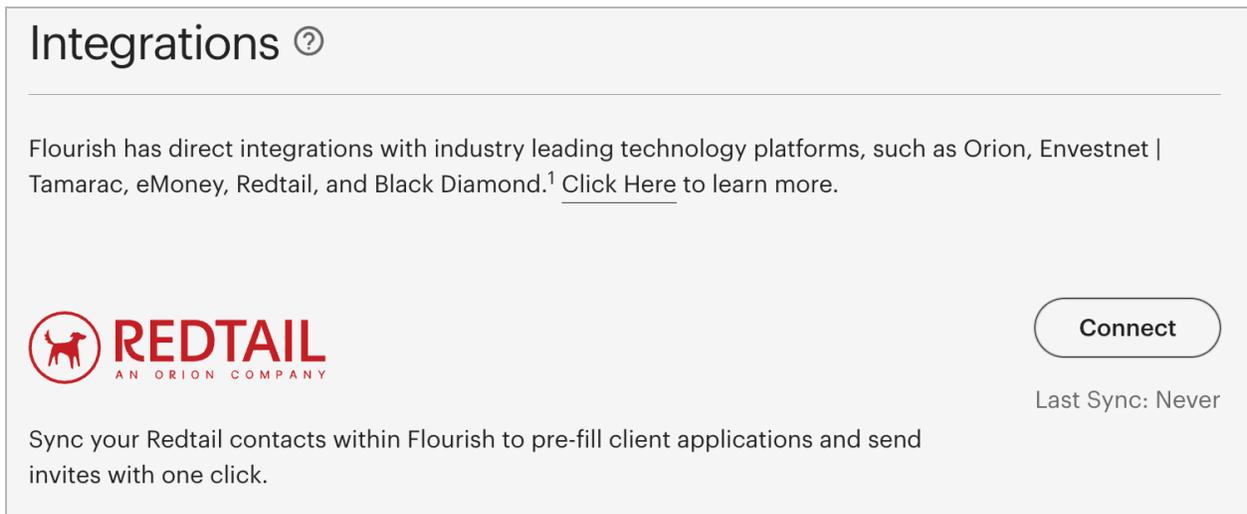
Navigate to Flourish.com and log in using your advisor credentials.

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



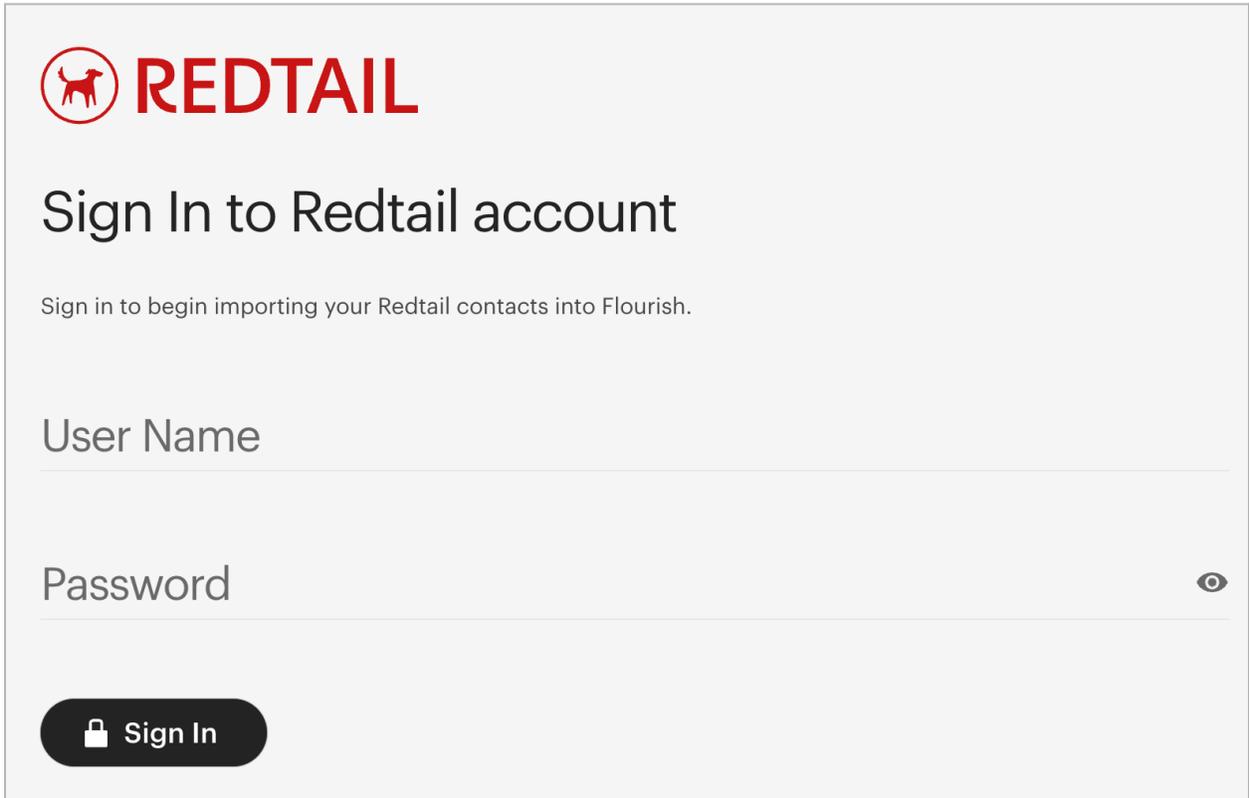
Step 2: Link the Integration

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 window 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, dark grey font. Underneath the heading is a smaller line of text: "Sign in to begin importing your Redtail contacts into Flourish." There are two input fields: "User Name" and "Password". The "Password" field has a small eye icon on the right side to toggle visibility. At the bottom left of the form is a dark grey button with a white lock 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.



 **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, enter the name of the contact you would like to invite in the **Redtail search bar** to prefill their information into the **Invite form**.

Overview Clients Teams Invite Referrals Settings Profile Resources Annuities

Send invitations to Flourish

Send invitations to Flourish by using the form below. If the client is eligible for more than one Flourish product, they will be able to choose which Flourish product(s) they want to apply for.

For Business accounts, only send an invitation to a single Authorized Person. They will be able to add additional AP's during the sign-up process.

🔍 Search contacts

 **REDTAIL**

Invite form

Invitee first name Invitee last name

Invitee email address

Redtail contacts

See all contacts → 

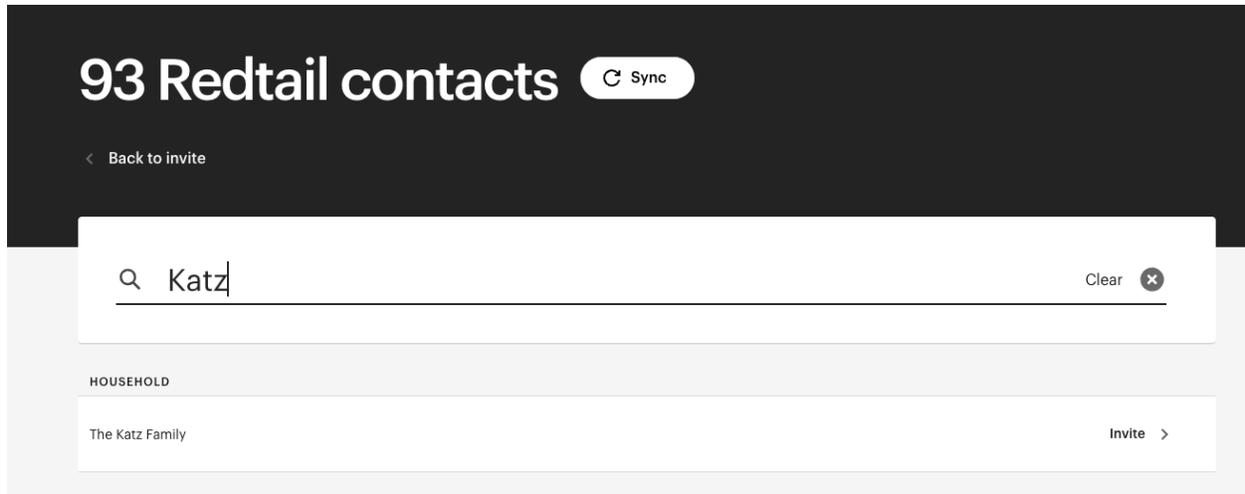
Invite multiple clients

Send multiple invitations at once by uploading a CSV file prefilled with your client data. 

Bulk upload →

You can also click **“See all contacts”** in the Redtail module on the right of the screen, to browse from your available Redtail contacts list.

To invite a client, click **“Invite”** next to their name. If they are already invited to Flourish and you would like to view their Household, click **“Manage”** next to their name.



In the invite form fields, confirm your client’s first name, last name, and email address, and select **Continue**. From here, you can select which Flourish product you would like to Invite or Apply your client to.

For Flourish Cash, you have two options:

- If you click **“Invite only,”** an invitation email will be immediately sent to the client and you can continue inviting additional clients to Flourish.
- If you click **“Prefill application,”** 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](#).

Which product would you like to set up for the Lee household?

Please select the Flourish product that you would like to enroll your client in from the list below:

Flourish Cash

Invite to Flourish Cash

Due to FDIC coverage rules, a person can only open one account in each account type category. For example, a person can open an individual cash account and a joint revocable trust with two grantors. However, a person cannot open an individual cash account and an individual revocable trust with one grantor.

Invite only

Send your client an invitation to fill out an application for Flourish Cash.

Send invite

Prefill application

Start the application process on behalf of your client before sending them an invitation to review and submit the application.

Flourish Annuities

Select

Flourish Crypto

Select

After clicking **“Prefill application,”** you’ll have the opportunity to correct, update or fill out any missing application information. Once complete, click **“Send to client”** to send an 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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