

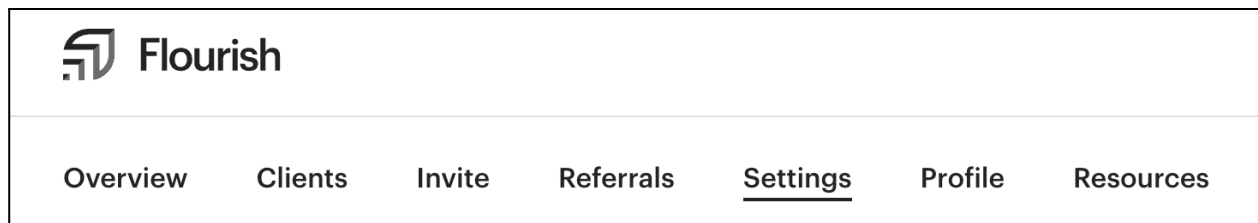
Flourish + Wealthbox Integration Guide

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

Total estimated time: ~5 minutes

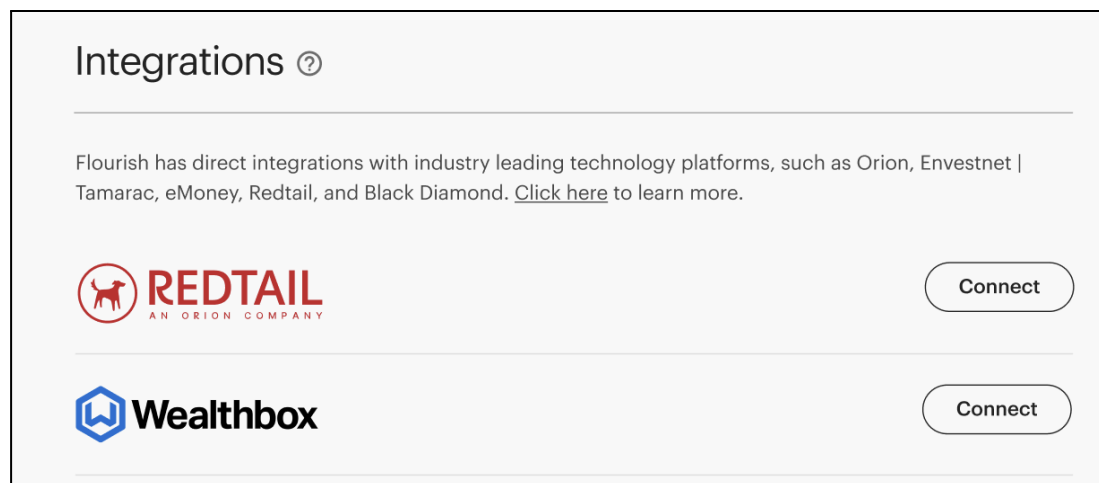
Step 1: Log into Flourish

- Navigate to Flourish.com and log in using your advisor credentials.
- Click **"Settings"** at the top of the Advisor Portal.

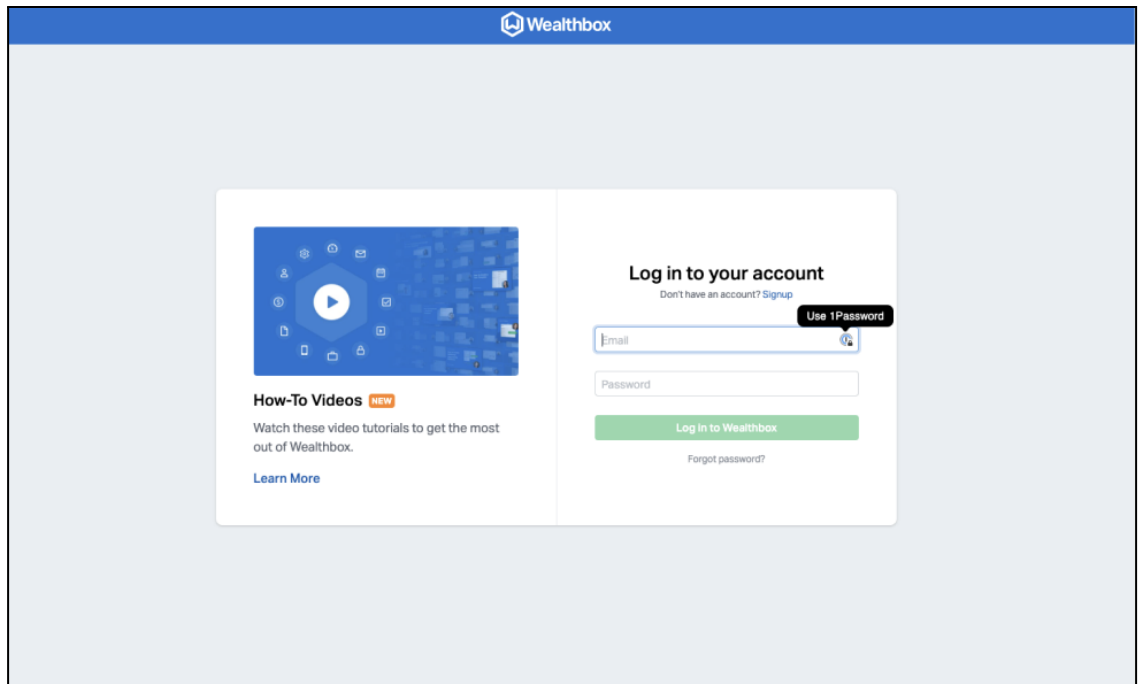


Step 2: Establish the Integration

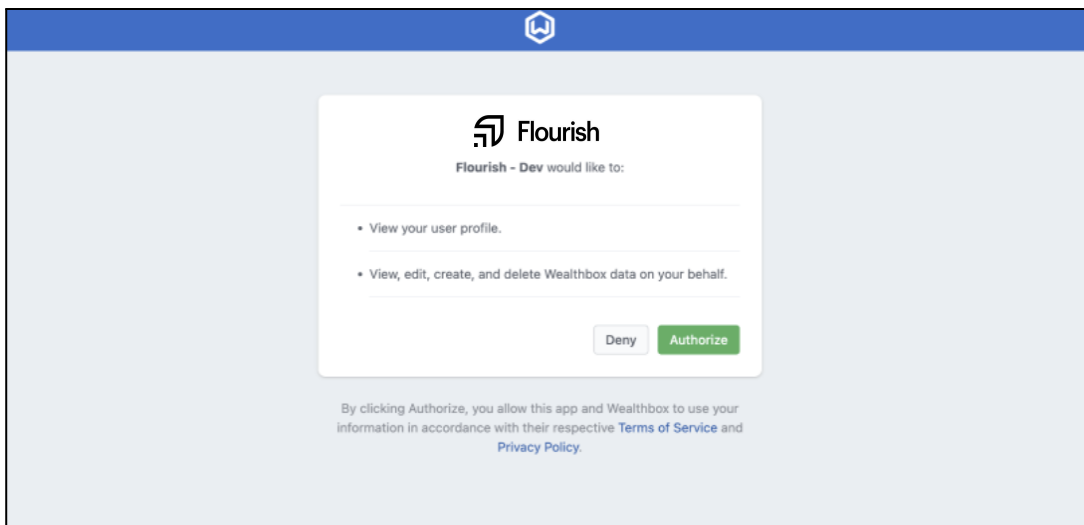
- Scroll down to **"Integrations"** and click **"Connect"** next to Wealthbox.



- In the pop-up window, enter your Wealthbox username and password and click "Log in to Wealthbox"

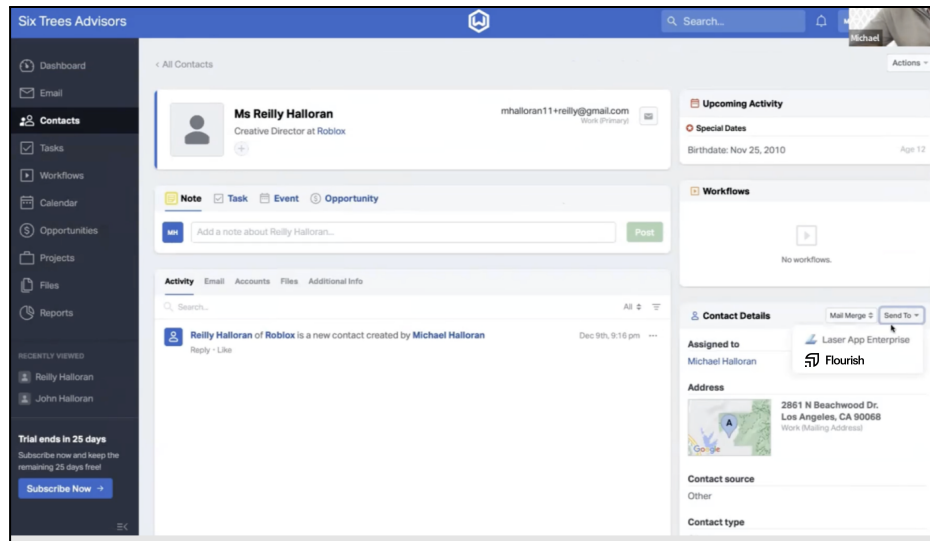


- Next, grant permissions and authorize Flourish to connect with Wealthbox. Click the **“Authorize”** button to finalize the integration.





Step 3: Log in to Wealthbox and invite contacts to Flourish

- Log in to Wealthbox
- Navigate to a client contact page, click the “Send To” dropdown, then select “Flourish”



Step 4: Prefill Client Data & Send Invites

- A Flourish invitation window will open in another tab in your browser. This invite page will have the information pre-filled for the contact you were viewing in Wealthbox.

 Flourish
 Wealthbox
About this integration [↗](#)

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.

Invitee first name

Kevin

Invitee last name

Smith


Invitee email address


kevin.smith@flourish.com

Add household partner ?

User(s) can send referrals ?

Products

 Flourish Cash

 Flourish Crypto

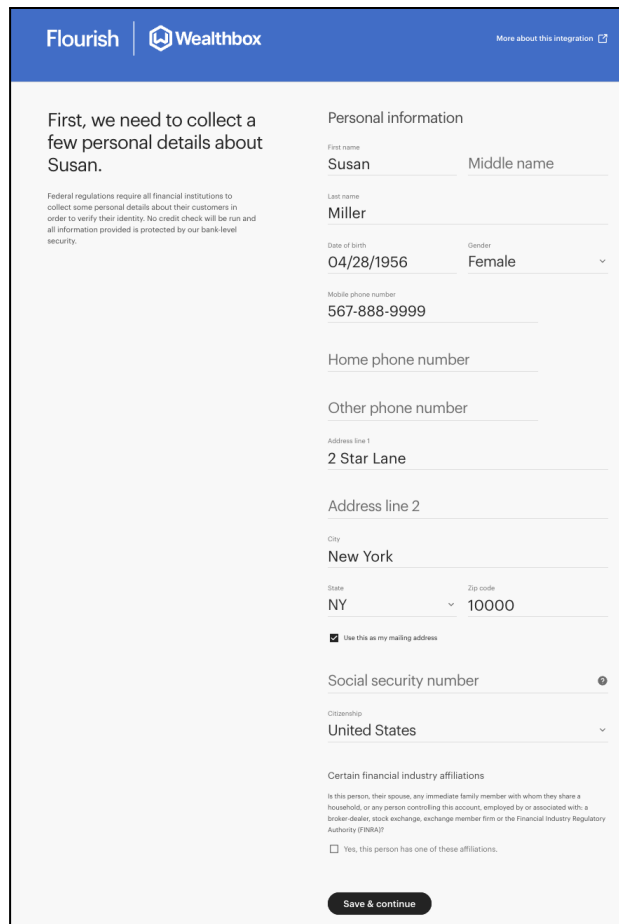
Click 'invite only' to send a Flourish invite to this person. Or click 'invite & apply' to both send them an invite and prefill an account application which they can then review and submit.

Invite only

Invite & apply

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

1. Clicking **"Invite & prefill application"** will allow you to pre-fill Flourish applications using data stored in Wealthbox.
 - You'll have the opportunity to correct, update, or fill out any missing application information.
 - Once complete, click **"Send to client,"** which will notify your client that they can set a password, review the application, and accept certain legal agreements in order to open the account.
 - You can learn more about [Advisor Account Initiation here.](#)



The screenshot shows a web form titled "Personal information" for a client named Susan Miller. The form is part of the Flourish + Wealthbox integration. It includes fields for 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, and zip code. The state is set to NY and the zip code is 10000. There is a checkbox for "Use this as my mailing address" which is checked. There is also a field for "Social security number" and a dropdown for "Citizenship" set to "United States". At the bottom, there is a section for "Certain financial industry affiliations" with a checkbox for "Yes, this person has one of these affiliations." and a "Save & continue" button.

2. Clicking **"Send invite only"** will immediately generate an invitation email, allowing clients to fill out the application at their convenience

That's it – you're done! Visit another contact page in Wealthbox in order to send additional invitations using the Flourish + Wealthbox integration.

Questions / Support

For any questions related to the integration, please reach out to integrations@flourish.com

For general support, please reach out to [our support team](#).

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