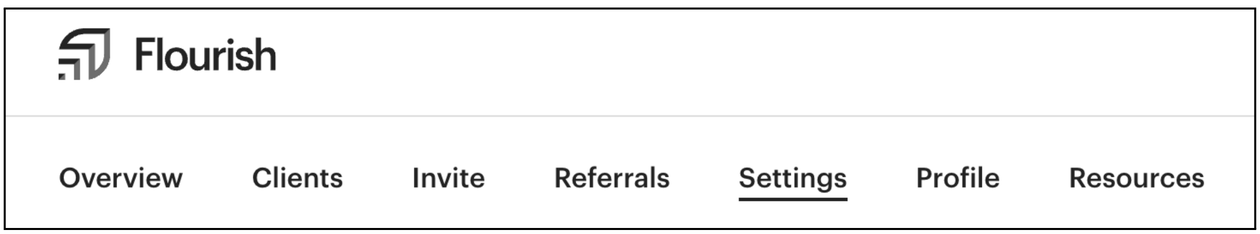
Flourish + Wealthbox Integration Guide

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

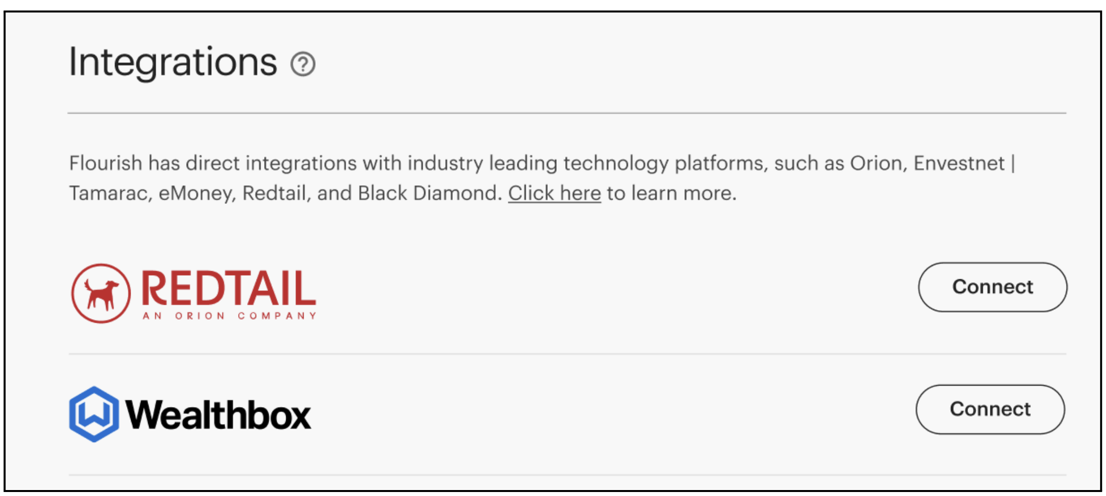
Step 1: Log into Flourish

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

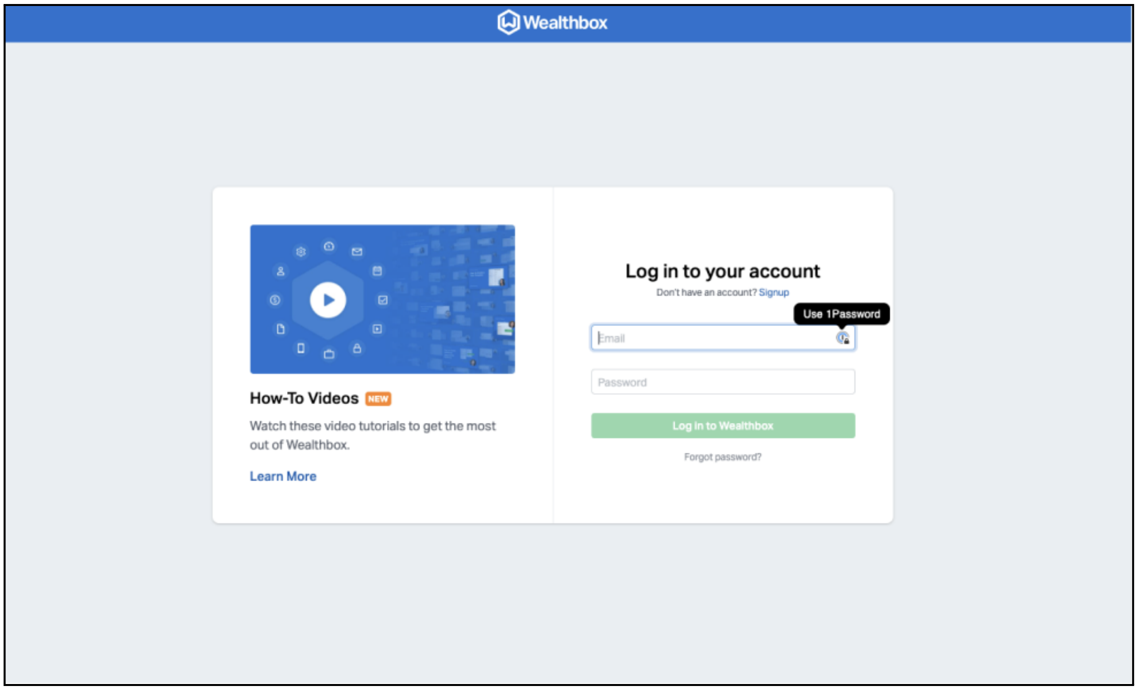


Step 2: Establish the Integration

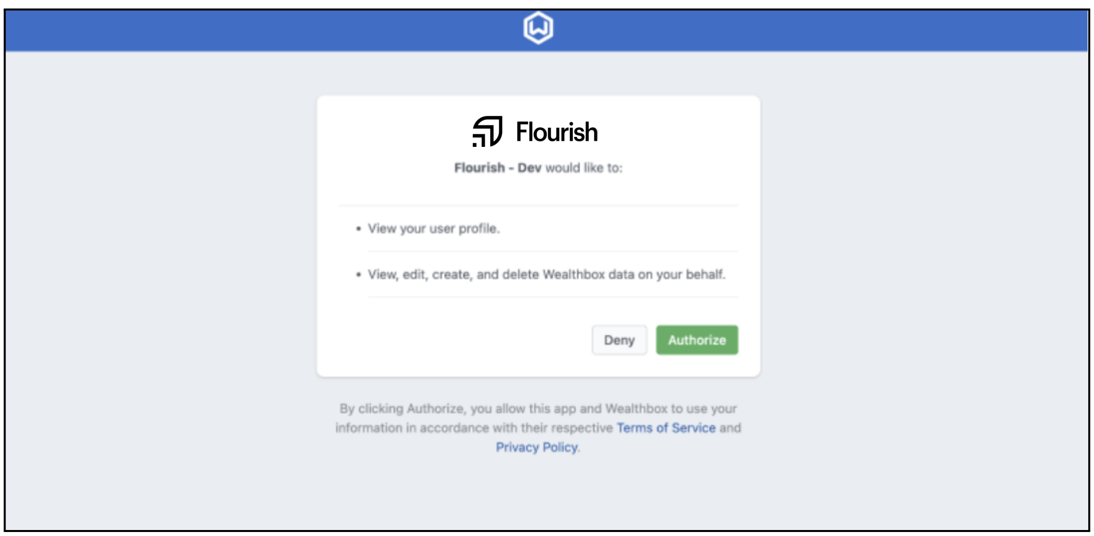
- Scroll down to "**Integrations**" and click **"Connect"** next to Wealthbox.



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

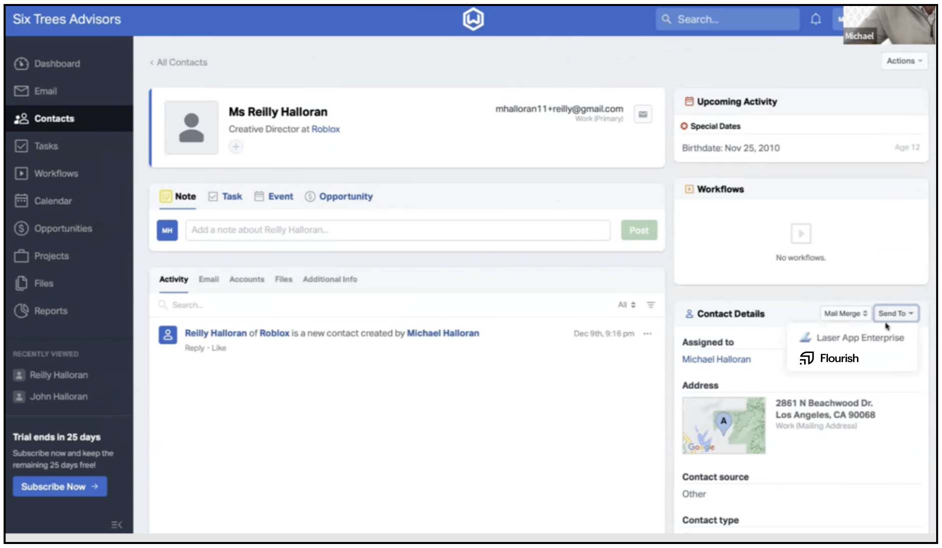


- Next, grant permissions and authorize Flourish to connect with Wealthbox. Click the "**Authorize**" button to finalize the integration.



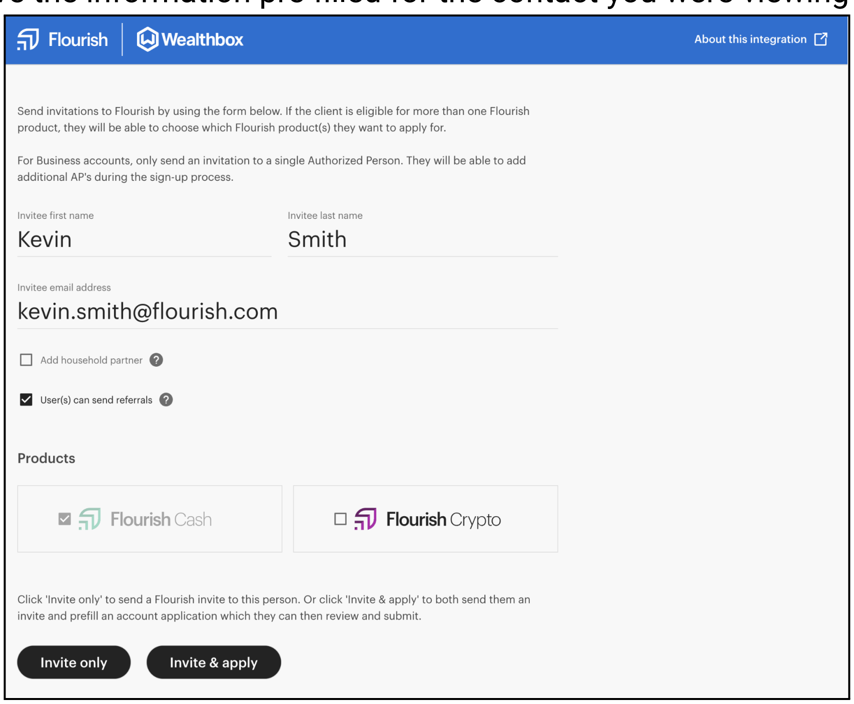
Step 3: Log in to Wealthbox and invite contacts to Flourish

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



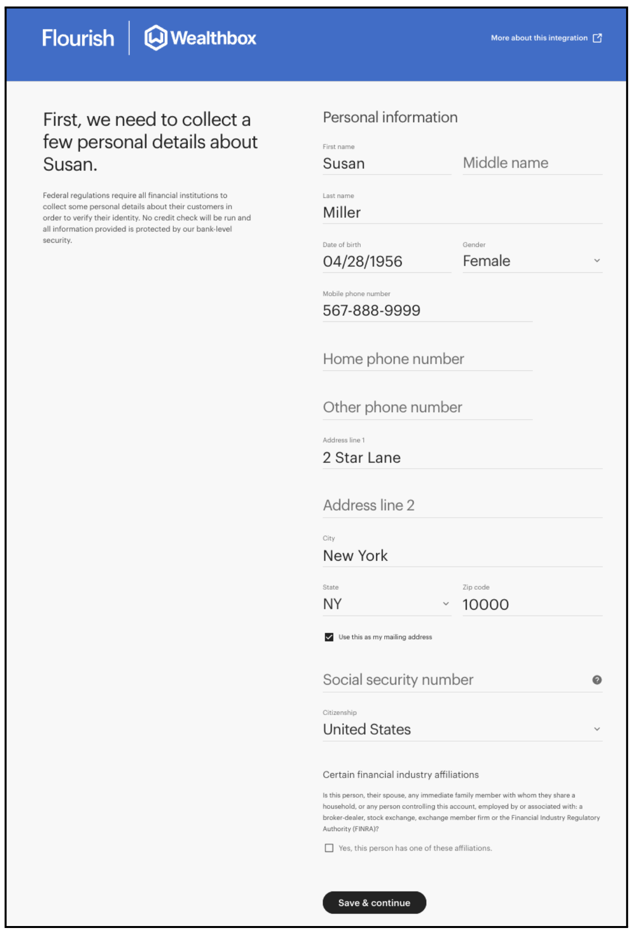
Step 4: Prefill Client Data & Send Invites

- 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.



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.



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 Wealtbox 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.