Enabling the Fidelity® Integration within eMoney

Setting up the Fidelity brokerage platform integration within eMoney is simple, however, because of the nature of this integration a few additional steps are required to initiate the data transmission and enable full functionality. To enable your access, follow these steps.

COORDINATE a request for services

eMoney subscribers interested in enabling the Fidelity integration should:

1. Submit the User Access Request Form for Integration Services. This form can be found in the WealthCentral® Forms Library and is submitted through the WealthCentral® Service Center. Note, this form is specific to the eMoney integration and is required even if the firm has already completed one for a different third-party integration.
2. The CE IWS Technical Support team will review the User Access Request Form for Integration Services and confirm if there are any additional forms/agreements required. Possible additional forms include the Client Vendor Transmission Authorization and Attestation Amendment. If so, it will be communicated.

* **Important Note:** Firms cannot have their data masked in the transmission to eMoney, it removes the ability to leverage functionality like Self-Registration. Firms adding G-numbers to their existing transmission to eMoney must also complete the Client Vendor Transmission Authorization.

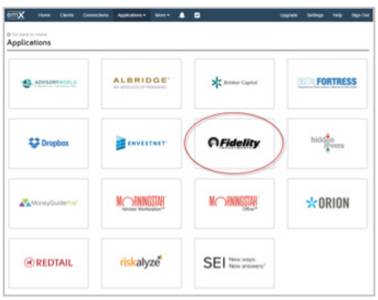
CONNECT your data

Once the data transmission has been established, you may now turn on the Fidelity Integration for yourself.

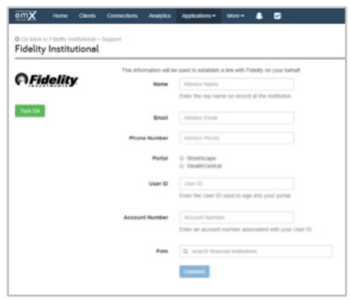
Login to eMoney

Click on "Applications" then "View All Applications"

Select "Fidelity Investments" and then click the "Turn On" button



Enter the required information to establish a link with Fidelity, and select "Connect"*

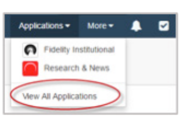


Once the feed is approved, the integration will be ready for use

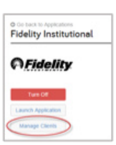
* **Important Note**: If you've previously established a Fidelity Connection, the Setup page may look different but the integration will be live once you hit Connect. If a Fidelity Connection has not been previously established but your BD has already made a request as outlined in step one, please allow approximately 24 hours for the Connection to be approved and established.

CONSIDER which clients to enable the integration for

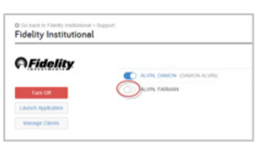
To complete the integration setup, select which clients should be enabled.* Remember, you must enable clients by following the steps outlined below in order for the integration to work.



Click on "Applications" then "View All Applications"

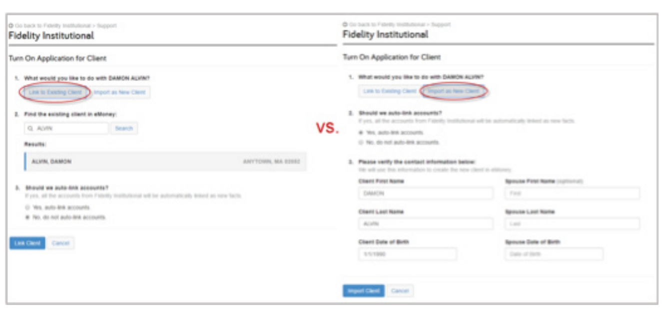


Select "Fidelity Investments" then "Manage Clients"

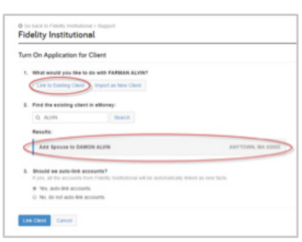


Select which clients to enable

Import client as new or link to an existing client in eMoney



Add a spouse and create a Household by selecting "Link to Existing Client"



Once clients are enabled, integration features will be available within the Client Portal

* **Important Note**: If you choose to auto-link accounts for the primary client or spouse, all of their accounts at Fidelity will automatically connect into eMoney; please reference our Frequently Asked Questions on the reverse side to understand how auto-linking may affect the functionality of other integrations enabled.

FREQUENTLY ASKED QUESTIONS

Why did I lose access to features available with other integrations when I enabled the Fidelity brokerage platform integration?

Fidelity is a connections-based integration. That means account data is pulled through the integration as a data feed similar to how other advisor connections are established. eMoney's connection-based integrations require that accounts be linked from the integrated third-party in order to access the account-specific integration features. In other words, you won't be able to use account-level integration features available through one integration with accounts that have been linked through a different integration.

What other integrations available in eMoney are connections-based?

Other connections-based integrations currently available include Orion, Albridge, Redtail and Envestnet.

How are other connections-based integrations affected if the Fidelity integration is enabled?

Other integrations most affected include:

Orion: When accounts are linked from Fidelity, Advisors will still have access to Orion's performance reports and Vault integration in emX; the only integration feature that will not be available is the individual account performance numbers that display on the Client Overview page in emX.

Albridge: When accounts are linked from Fidelity, Advisors will only have access to the Albridge SSO feature through the integration; access to Albridge account-level performance reports will not be available.

Redtail and Envestnet are also affected if the Fidelity integration is enabled, however, because the features are primarily SSO-based, it's to a lesser degree.

Redtail: The default for the Redtail integration is to not auto-link accounts; if an advisor were to choose to link accounts from Redtail they would need to unlink them and re-link to Fidelity.

Envestnet: The following SSO features will still work if even if the advisor has turned on the Fidelity integration for the client, but has not linked the accounts:

- ✔ Bidirectional SSO between emX and the Envestnet platform
- ✔ SSO into the Envestnet platform from the Plans Page with the current client

How do I know and understand through which integration I should link my clients?

Through integration, it's our goal to provide advisors with easier access to the financial technology platforms and capabilities they rely on most in their businesses. Because each integration provides advisors with a number of unique benefits, the best way to determine through which integration you should link your accounts is to evaluate your current and future use and needs, as well the features most beneficial on an individual account level.

Can I select which clients are linked through each integration on a client-by-client basis?

Yes, when importing or linking a client to an integration you should choose 'No' when asked if you want to auto-link accounts. Then go to Connections to link individual accounts for each specific connection.

How do I unlink clients I've already linked through a previous integration?

The easiest way to unlink is on the Connections – Accounts page.

Are eMoney and Fidelity planning to update the way these integrations work to allow advisors to benefit from the full functionality of more than one connections-based integration at a time?

As of right now, the most effective way for this account information to be pulled into eMoney from Fidelity is as a connection.

NEED MORE SUPPORT?

Check out our comprehensive Q&A posted here or connect with a member of eMoney's Client Engagement team.

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