Logo

Description automatically generatedBroadridge Fi360 Solutions

2 Chatham Centre

Pittsburgh, PA 15219 [www.fi360.com](http://www.fi360.com/)

***WE MAY ALREADY HAVE YOUR DATA!***

Please note, you should not complete or submit the attached authorization form if you are with a **Broker Dealer or RIA aggregator**. Contact [fi360integrations@broadridge.com](mailto:fi360integrations@broadridge.com) to see if your firm has already been approved for this integration.

**Things you should know.**

1. ePlan Services does not require an Authorization Form. The integration does need to be authorized at the Broker-Dealer/RIA level. If you wish to move forward and integrate with ePlan Services, please have a person with your BD Home Office/RIA who is able to authorize a third party data transmission send an email to Mark Mower and Jon Hutcheson at ePlan Services.
2. In the email, please include the Firm CRD number(s) and ask ePlan to enable integration with Fi360. The email addresses at ePlan are: Mark.Mower@eplanservices.com and [Jon.Hutcheson@eplanservices.com](mailto:Jon.Hutcheson@eplanservices.com)
3. Please copy Fi360Integrations@broadridge.com so we, at Fi360, can keep record of the entire integration process.
4. We receive a monthly file from ePlan that contains month end values. This data is typically received during the 2nd week of the month following month end.
5. Please be sure to enter your CRD number under the [integrations tab](https://fi360.zendesk.com/hc/en-us/articles/235591108-How-To-Request-Integrations-With-A-Provider-Fiduciary-Focus-Toolkit-). This helps us at Fi360 keep track of your request.
6. If you do not see your integration feed within 6 weeks please reach out to [Fi360integrations@broadridge.com](mailto:Fi360integrations@broadridge.com) for an update.