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. Fidelity Does not require an authorization form. Please reach out to [AdvisorHelpDesk@fmr.com](mailto:AdvisorHelpDesk@fmr.com) and request they include your firms data in the Fi360 feed Please supply them with all eligible CRD numbers you are requesting to be integrations with Fi360. Please also cc [Fi360integrations@broadridge.com](mailto:Fi360integrations@broadridge.com).
2. We receive a monthly file from Fidelity that contains month end values. This data is typically received during the 2nd week of the month following month end.
3. 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.
4. 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.