Logo

Description automatically generatedBroadridge Fi360 Solutions

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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. There is no authorization form for integration with Principal. Principal is unable to send the file directly to a third party. Please contact your relationship manager at Principal and request their PRBB or Principal Book of Business File. **You must have a minimum of five (5) plans to proceed with this integration.**
2. Once you receive the file, please send it to us via email at fi360productops@broadridge.com. We do request that when sending the file it is sent secure. You will need to send us the file as frequent as you would like data updated within the software.
3. You will need to request and send this file to Fi360 as often as you would like the data updated whether it be monthly or quarterly.
4. We do ask that you give us 3-10 business days to process and upload this data into our software.
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.