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. Please contact your representative at Alerus Retirement and request that your firm's data be sent to Fi360. Alerus will forward you the appropriate authorization form. If you do not have a contact at Alerus, please contact Fi360 Customer Support at [Fi360Integrations@broadridge.com](mailto:%20Fi360Integrations@broadridge.com) to move forward with the integration.
2. We receive a monthly file from Alerus that contains month end values. This data is typically received during the 1st 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.