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. This is a Plan Sponsor Authorization ONLY. The Plan Sponsor for this plan must sign this authorization. This authorization only authorizes 1 plan. To obtain the authorization forms please reach out to your Relationship Manager at KTrade and request an integration with Fi360. Please note, KTrade requires an authorized party with the plan trustee to approve the integration feed.
2. We receive a monthly file from KTrade 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. When sending the completed authorization please copy [Fi360Integrations@broadridge.com](mailto:Fi360Integrations@broadridge.com)
5. 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.