



NEWS RELEASE

Fidelity® Makes It Even Easier for Wealth Management Firms to Manage Their Integrations and Technology Ecosystems

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Fidelity Increased Real-Time Integrations by 200% Since 2018; New Integration Xchange Capabilities Streamline the Deployment and Management of 200+ Available Fintech Integrations

AdvisorEngine, Advyzon, Agreement Express, Laser App, Orion and 55ip Among New and Enhanced Integrations

BOSTON--(BUSINESS WIRE)-- Today, **Fidelity Institutional**SM announced updates to Integration Xchange, its award-winning, open architecture digital store that helps wealth management firms build and manage custom technology solutions. Fidelity offers integrations with more than 200 fintechs, including 400+ active points of integration with those providers, as well as hundreds of other integrations (including APIs, single-sign on and more) directly with clients' platforms. More than 80% of advisors think integrations – which help firms develop tailored platforms that meet the distinct needs of their businesses and customers – are important to their firm's overall technology strategy.ii Integration Xchange now makes it even easier to manage those critical integrations with actionable insights in a new dashboard and more self-service tools for data management.

"Now that we've established Integration Xchange as a go-to destination for firms to understand the huge range of integrations we offer and how they fit with their platforms, we're adding more features to help clients manage their ecosystems," said Lisa Burns, head of Platform Technology, Fidelity Institutional. "We launched self-service tools for testing and overseeing integrations in 2020, and now we're adding more options to help clients take action, while also continuing to expand and deepen our industry-leading fintech offering to meet the wide range of needs and help our clients work more efficiently."

Integration Xchange now offers:

- A new dashboard that provides a quick, comprehensive snapshot of integrated fintechs, including details such

as digital certificate expiration status, helping firms understand where they need to take action to avoid disruption and ensure ongoing connectivity between systems. Fidelity will continue to add new information to the dashboard, including version details to help firms know when it's time to upgrade and test environment status so they can make the most of available testing options.

- Self-service capabilities to easily manage data transmission rules on the platform with just a few clicks. This allows firms to control the data they share with fintechs, eliminating paperwork and saving time. It builds on Fidelity's self-service tools for **testing, deploying and managing integrations**, and tools for helping firms with **operational oversight and control of their technology ecosystems**.
- New Fidelity APIs that help firms facilitate streamlined workflows to simplify operations and drive efficiency for key business processes. The first release includes search, retrieve and update work items APIs. Additional workflow and alerting APIs, which save firms time by automating interactions, are planned for later this year.

"We're always thinking about how we can support our advisors, and over the past year we worked closely with Fidelity to enhance our technology experience using a range of real time integrations," said Trevor Chuna, CTO of Sequoia Financial Advisors. "The combination of the information in Integration Xchange and the deployment team's knowledge helped us strengthen the platform to meet the evolving needs of our advisors."

Fidelity Continues to Increase and Deepen its Fintech Integrations to Meet Client Needs

Fidelity delivers flexibility and efficiency for firms through integrations with more than 200 fintech providers, and increased its number of real-time integrations by 200% since 2018.

AdvisorEngine, Advyzon, Agreement Express, Laser App, Orion and 55ip are among the new or recently enhanced integrations:

- Fidelity and AdvisorEngine are rolling out deeper integrations for account opening that will enable advisors to more seamlessly open accounts on the Fidelity platform. This adds to existing integrations for account opening, transfer of assets, trading, billing, document delivery and more.
- Advisors can now leverage new account opening and single-sign-on (SSO) integrations between Advyzon and Wealthscape to more efficiently open accounts. New integration capabilities also include the ability to view account positions and monitor Fidelity alerts in Advyzon, as well as to have custodial statements synced to the Advyzon Document Vault.
- New Agreement Express integrations provide the ability to prefill and eSign select custody forms to open new accounts and maintain existing accounts within the Agreement Express platform. Paperwork and data are submitted to Fidelity for straight-through processing.
- New integrations with Laser App allow custody advisors to insert data from a CRM into the new Laser App Anywhere Account Opening solution to open an account, receive a reserved Fidelity account number, acquire

signatures and initiate a transfer of assets, as needed.

- In Q1 2021, Fidelity and Orion introduced integrations that allow end-investors to view Fidelity documents, including statements, trade confirmations, tax documents and correspondence, in the Orion Client portal. This builds on Fidelity's existing deep integrations with Orion, including API and SSO integrations into Fidelity's account opening tools, as well as informational APIs and real-time alert capabilities from Wealthscape integrated directly into Orion Insight.
- 55ip and Fidelity launched deep integrations to streamline and simplify the advisor experience, including SSO from 55ip to Wealthscape; automated account integration eliminating the need for manual uploads; and enhanced processing for trade list execution.

Fidelity is Committed to an Open Architecture Approach and Delivering Choice to Clients

Fidelity offers seven direct integration types that enable intermediary clients to customize their digital experience, including APIs, SSO integrations, server-to-server alerts, inbound file processing, outbound transmissions, Financial Information eXchange (FIX®) trading connectivity and network connectivity integrations. It launched Integration Xchange in October 2018 to help firms seamlessly customize and connect their technology solutions through integrations, leveraging the flexibility that Fidelity offers to build platforms that meet their business needs.

"The continued evolution of Integration Xchange is one example of Fidelity's enterprise-wide commitment to meeting the evolving needs of our customers through technology and innovation," said Burns. "Our clients look to us for technology that makes their lives easier, and because of our scale we are able to continue making significant investments on behalf of our clients to deliver on that demand."

For more about Integration Xchange, please visit go.fidelity.com/IntegrationXchange.

About Fidelity Investments

Fidelity's mission is to inspire better futures and deliver better outcomes for the customers and businesses we serve. With assets under administration of \$10.3 trillion, including discretionary assets of \$3.9 trillion as of March 31, 2021, we focus on meeting the unique needs of a diverse set of customers: helping more than 35 million people invest their own life savings, 22,000 businesses manage employee benefit programs, as well as providing more than 13,500 wealth management firms and institutions with investment and technology solutions to drive growth. Privately held for 75 years, Fidelity employs more than 47,000 associates who are focused on the long-term success of our customers. For more information about Fidelity Investments, visit <https://www.fidelity.com/about-fidelity/our-company>.

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Fidelity offers integrations with more than 200 fintechs, including 400+ active points of integration with those providers as of March 2021.

i In April 2020, Integration Xchange won a Celent Model Wealth Manager award. Full description of award categories and criteria are available here: <https://www.celent.com/awards/model-wealth-manager>. Integration Xchange also received the 2019 **WealthManagement.com** Industry Award for Custodian Technology. Full descriptions of award categories and criteria are available here:

<https://events.wealthmanagement.com/categories/>.

ii The 2020 Fidelity Financial Advisor Community COVID Series - Technology Study. The study was an online blind survey (Fidelity not identified) and was fielded during the period July 10th thru July 16th, 2020. Participants included 422 advisors who manage or advise upon client assets either individually or as a team, and work primarily with individual investors. Advisor firm types included a mix of banks, independent broker-dealers, insurance companies, regional broker-dealers, RIAs, and national brokerage firms (commonly referred to as wirehouses), with findings weighted to reflect industry composition. The study was conducted by an independent firm not affiliated with Fidelity Investments

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