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FIDELITY® ADDS NEW THIRD-PARTY INTEGRATIONS TO WEALTHSCAPESM PLATFORM

Addepar and Wealthbox Among the Latest Integrations Available in Integration Xchange

BOSTON, April 24, 2019 – WealthscapeSM Integration Xchange, Fidelity’s open architecture digital store, now features more integration options to help wealth management firms build technology platforms that meet their distinct business needs. The integrations offer firms the ability to streamline business processes and workflow through APIs, data feeds and more, using both Fidelity solutions and their choice of more than 120 third-party tools.

“The goal of Integration Xchange is to help firms tailor technology platforms to their advisors’ and investors’ needs by giving them access to a wide variety of options in a single location,” said Lisa Burns, head of Platform Technology, Fidelity Institutional. “Expanding our integrations with third-party tools is a key priority. Over the past few months, we’ve added a number of integrations designed to increase advisor efficiency, which in turn can help advisors spend more time with their clients.”

Fidelity Delivers More Choice through Broader, Deeper Access to Third-Party Tools

Fidelity offers integrations with third-party technology solutions for CRM, financial planning, analytics, portfolio management, office tools and more. New integrations include:

- Addepar, a wealth management platform that specializes in data aggregation and performance reporting to help investors with complex assets make informed decisions. This integration features Fidelity brokerage account information provided to Addepar as well as contextual linking capabilities from Addepar to select Wealthscape pages. Those pages include quick access to intra-day positions and the ability to initiate and view money movement activities, enabling advisors to seamlessly work between the two platforms.

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- Wealthbox®, a web-and-mobile CRM application for financial advisors. The integration features single sign-on from Wealthbox to Wealthscape and Fidelity brokerage account information provided to Wealthbox, resulting in increased advisor efficiency. Fidelity and Wealthbox plan to include an account opening integration later this year.

Fidelity is also expanding its integrations with several third-party tools announced when Integration Xchange launched last year, including Orion Advisor Services, LLC. In Q2 2019, Fidelity and Orion will deepen their account opening integration, providing advisors with an automated experience that can reduce errors and create efficiencies during account opening, as well as integrations for real time brokerage information and alerting capabilities from Wealthscape for an improved client experience.

Fidelity Remains Focused on Meeting Advisor and Third-Party Needs

Since its launch, Integration Xchange has received praise from both clients and third-party technology providers. Integration Xchange users report that their firms are better prepared for platform deployment and are able to integrate more quickly than they were without Integration Xchange.

“Integration Xchange makes it easy to explore features and solutions, which helps stir creative ideas and understand what’s possible with the power of Fidelity’s APIs and workflows,” said Jeff Kliewer, director of integration partnerships and support at Orion Advisor Services, LLC. “It has been an invaluable resource for helping us strategize and plan out our roadmap for deeper integration.”

Planned Enhancements to Integration Xchange User Experience

Fidelity continues to enhance Integration Xchange to help firms explore and develop their platforms. Updates planned for later this year include a more detailed, interactive third-party marketplace experience, a business capabilities matrix and enhanced global site documentation search functionality – all of which will make it even easier for a firm’s technology team to identify the best options for their needs and plan the overall platform.

Fidelity works with firms during the platform development process to refine their design and support their implementations.

For more about Integration Xchange and to discuss the solution with Fidelity, please visit <http://go.fidelity.com/IntegrationXchange>.

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