



# Firm Level Access for Integration Services

Use this form to add or remove firm level access to a third-party product or service available on Fidelity Wealthscape<sup>SM</sup>. Please note if the integration you are selecting uses Single Sign-On, Wealthscape Administrators at your firm also have the ability to add Single Sign-On entitlements to User IDs via the User ID Maintenance Tool once your firm has been enabled with the integration. Submit the completed and signed form via Service Center > Initiate Service Request > User Access & Entitlements > Access Request > Add or Modify Access. All changes are subject to the terms of the Fidelity Institutional Technology Services Agreement between Fidelity and your firm.

Firm Name	G Number
	G

## 1. Service to be Added or Terminated

Choose one.  
Important: You can only request one integration to add or terminate per form.

- |  |   |
|--|---|
| <input type="checkbox"/> 55ip                                | <input type="checkbox"/> Laser App              |
| <input type="checkbox"/> Addepar                             | <input type="checkbox"/> MoneyGuide             |
| <input type="checkbox"/> Advent APX on Demand                | <input type="checkbox"/> Orion Advisor Services |
| <input type="checkbox"/> Advyzon                             | <input type="checkbox"/> Redtail                |
| <input type="checkbox"/> Agreement Express (AEX)             | <input type="checkbox"/> Riskalyze              |
| <input type="checkbox"/> Black Diamond Performance Reporting | <input type="checkbox"/> Salentica              |
| <input type="checkbox"/> BlackRock Advisor Center            | <input type="checkbox"/> Skience                |
| <input type="checkbox"/> Ebix                                | <input type="checkbox"/> U.S. Bank SSO          |
| <input type="checkbox"/> eMoney Advisor emX                  | <input type="checkbox"/> Wealthbox              |
| <input type="checkbox"/> Envestnet Tamarac                   | <input type="checkbox"/> Workplace_by OS33      |
| <input type="checkbox"/> InvestCloud                         | <input type="checkbox"/> XTRAC Solutions        |
| <input type="checkbox"/> Junxure                             |   |

## 2. Signature and Date *Form cannot be processed without signature and date.*

By signing below you:

- Represent that the person who executes this form on behalf of your firm is a principal or officer of the firm and is properly authorized to do so by your firm.
- When terminating a service, you acknowledge that you and your firm are responsible for:
  - contacting the third-party provider to terminate their product or service
  - exporting data prior to termination, if applicable.

Print Name <i>First, M.I., Last</i>	Title	Email
Signature	Date <i>MM - DD - YYYY</i>	
<b>SIGN</b> ▶	▶	

