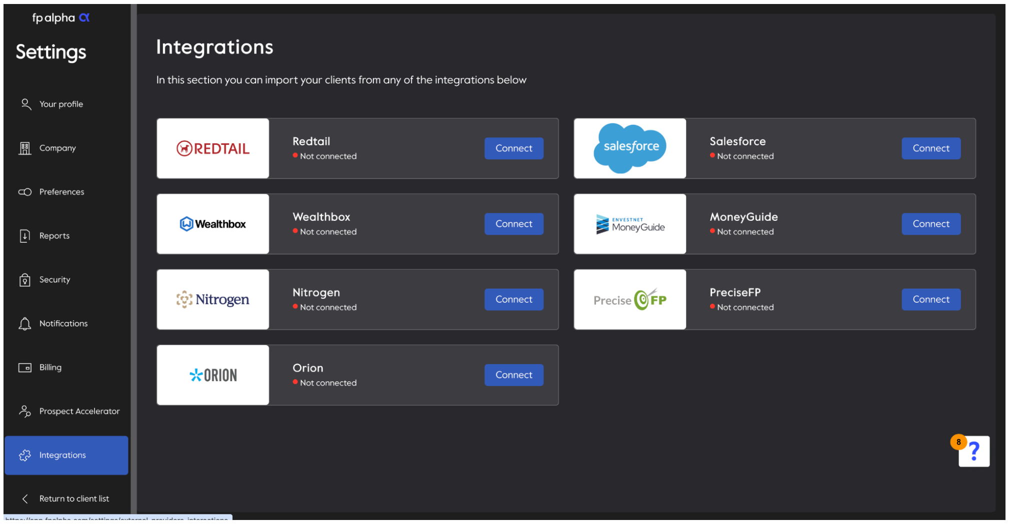
Money Guide Pro (MGP)

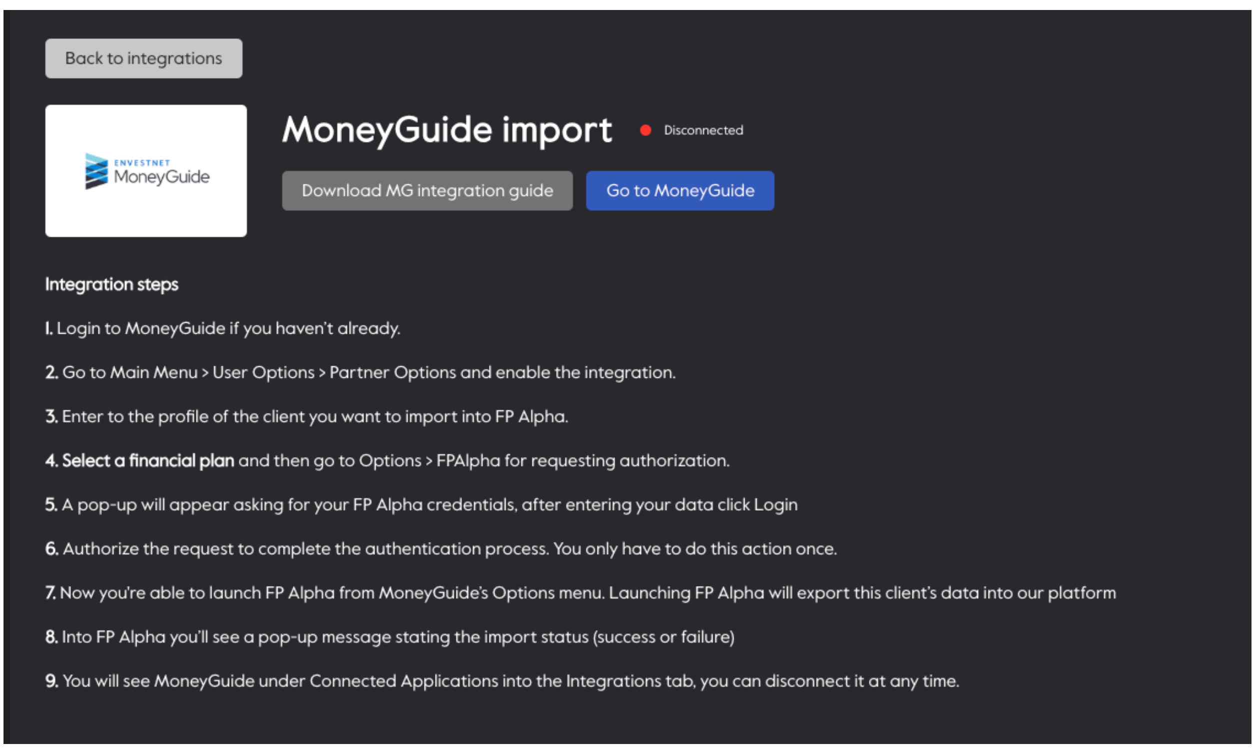
How to Integrate

Setting up the integration

Once you're logged in to your FP Alpha account, navigate to Account > Settings > Integrations. You'll see a screen with all FP Alpha integrations.

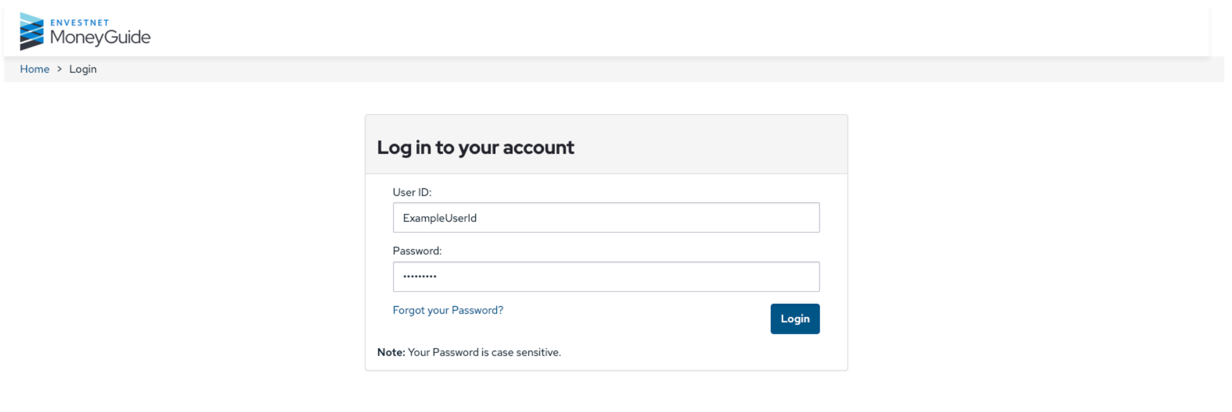


Select the MoneyGuide option and it will take you to a new screen with the integration instructions. Click on "*Go to MoneyGuide*" to get started.

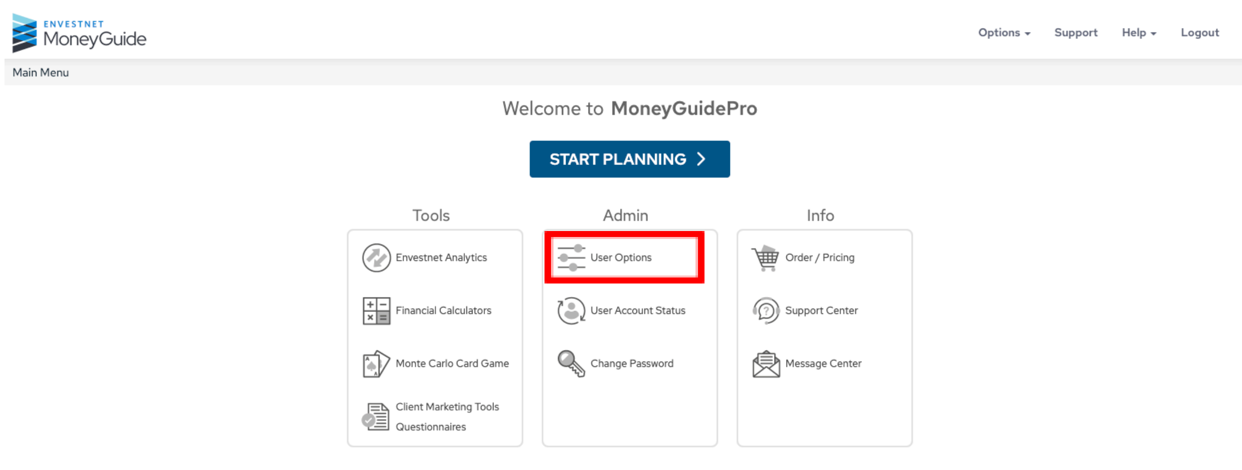


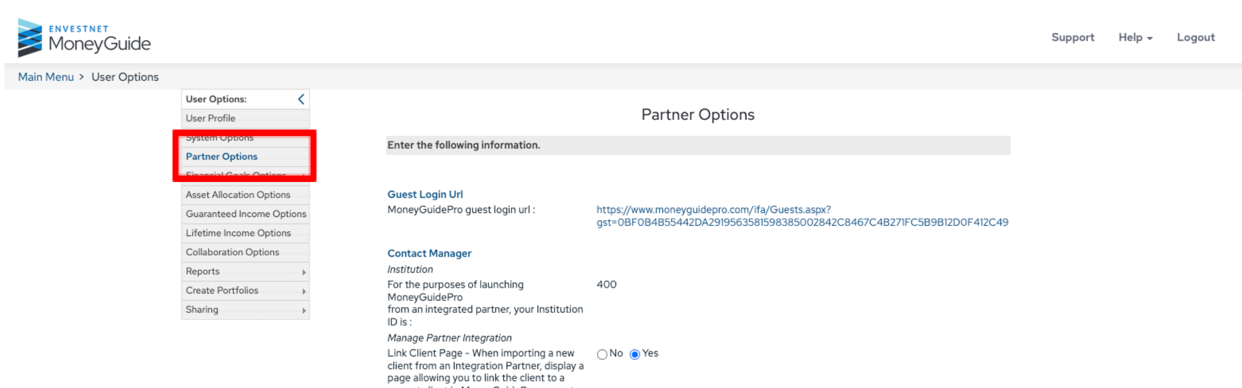
Step One

Login to MoneyGuide if you haven't already.



Go to Main Menu > User Options > Partner Options and enable the integration.





Allow Altruist : (•) No ( ) Yes

FPAlpha

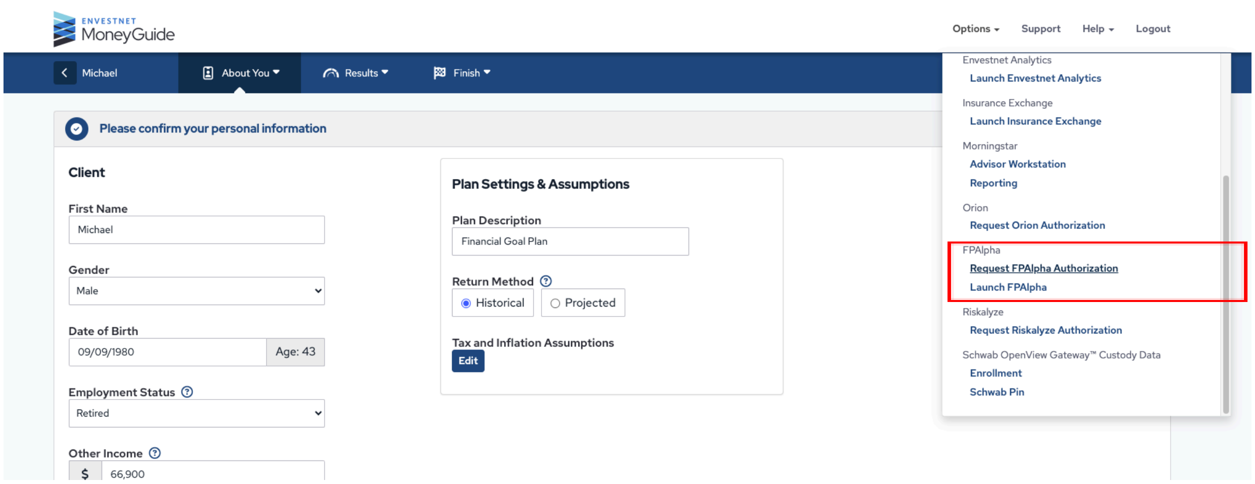
Allow FPAlpha : ( ) No (•) Yes

Riskalyze

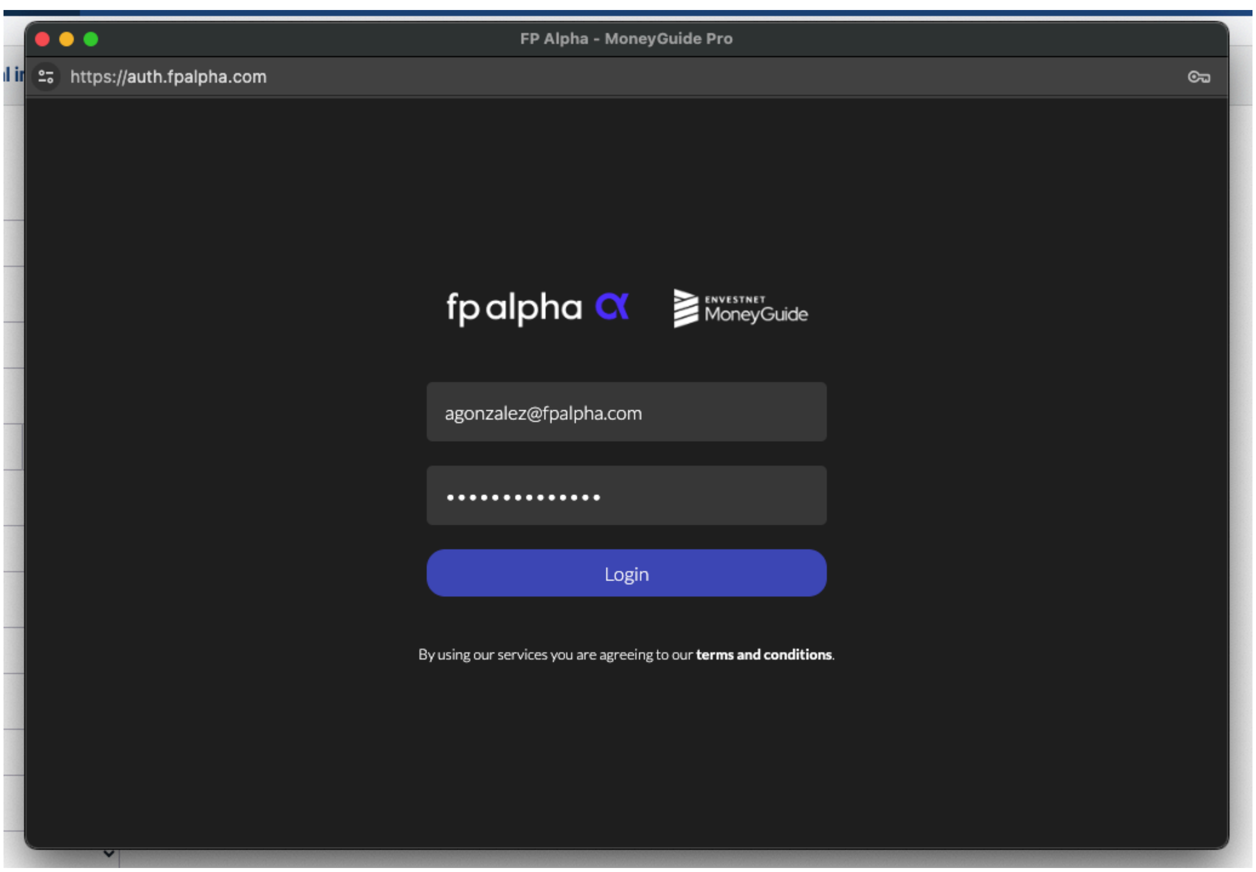
Allow Riskalyze : ( ) No (•) Yes

Step Two

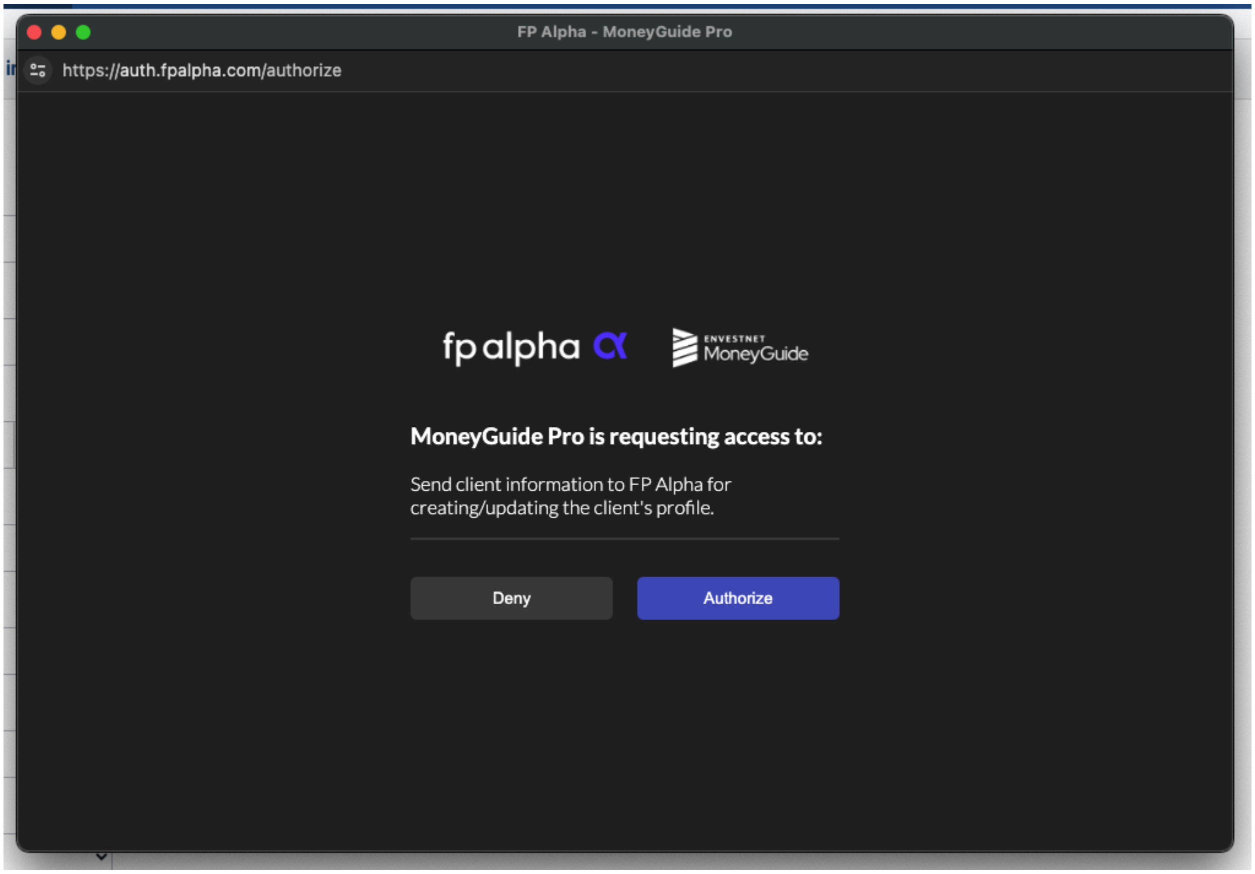
Enter the profile of the client you want to import into FP Alpha, select a financial plan, and then go to Options > FPAlpha for requesting authorization.



A pop-up will appear asking for your FP Alpha credentials, after entering your data click Login

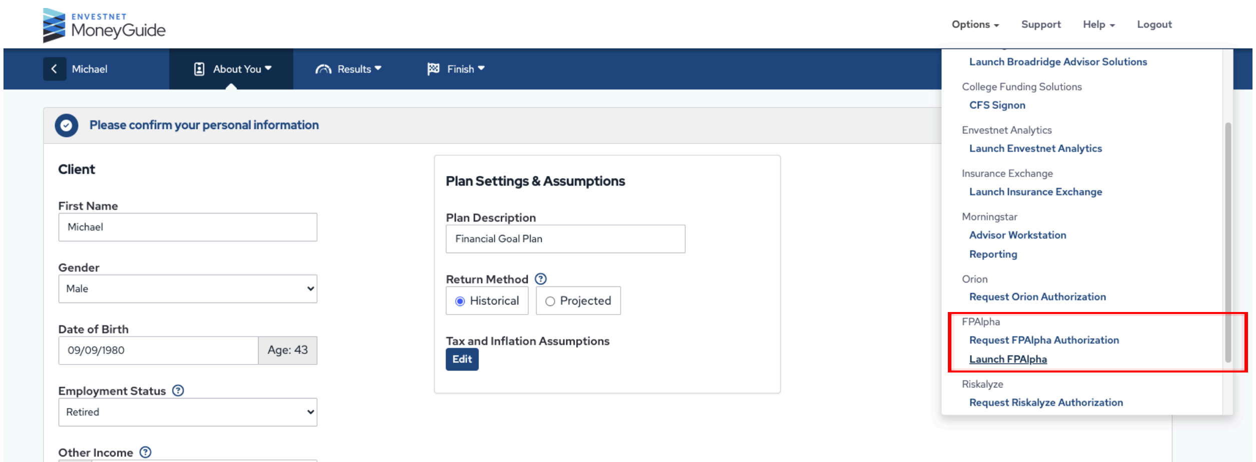


Authorize the request to complete the authentication process. You only have to do this action once.

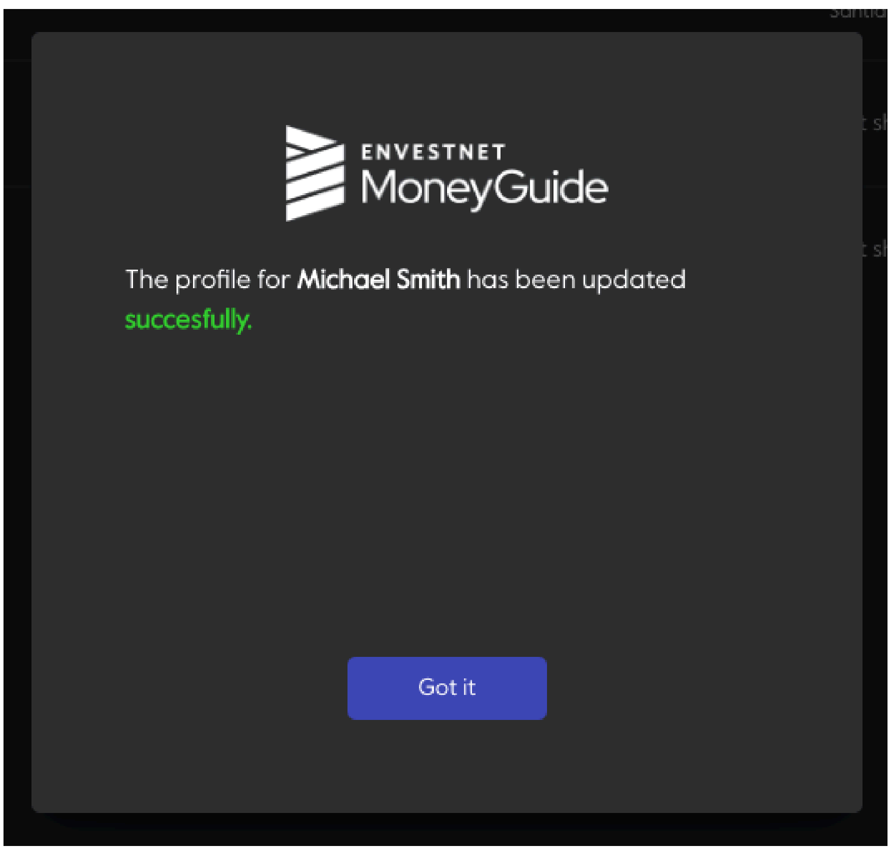


Step Four

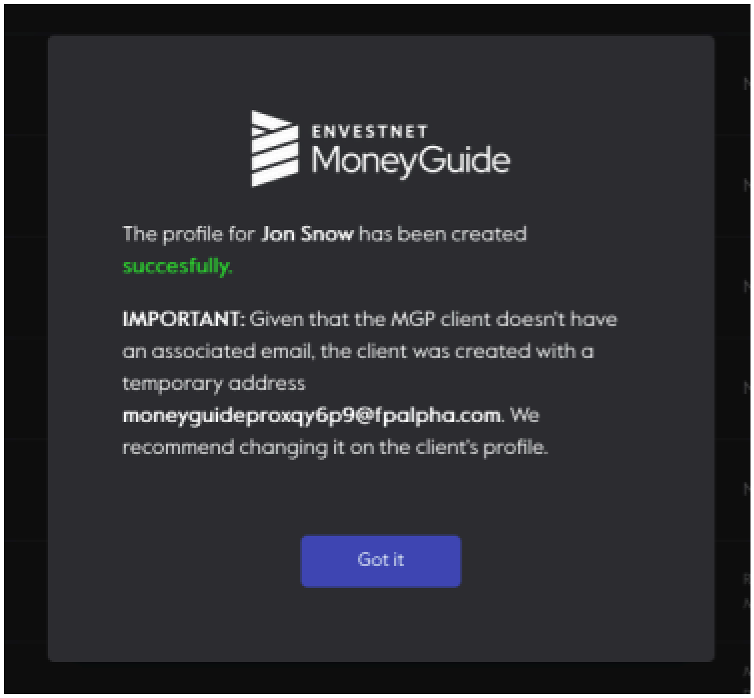
Now you're able to launch FP Alpha from MoneyGuide's Options menu. Launching FP Alpha will export this client's data into our platform



Into FP Alpha you'll see a pop-up message stating the import status (success or failure)

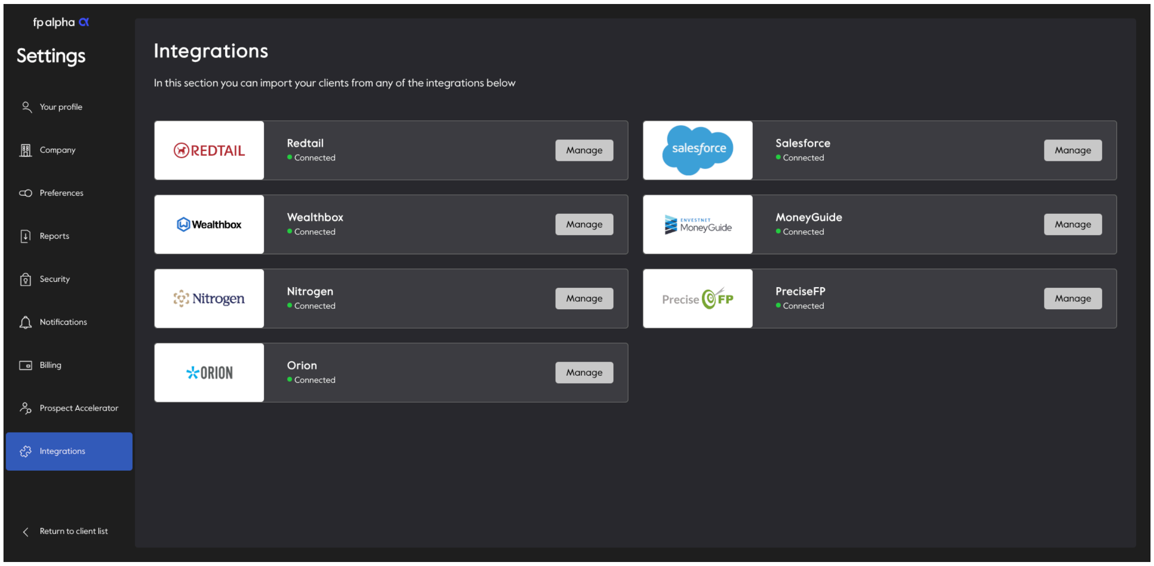


Could be exist some warnings:

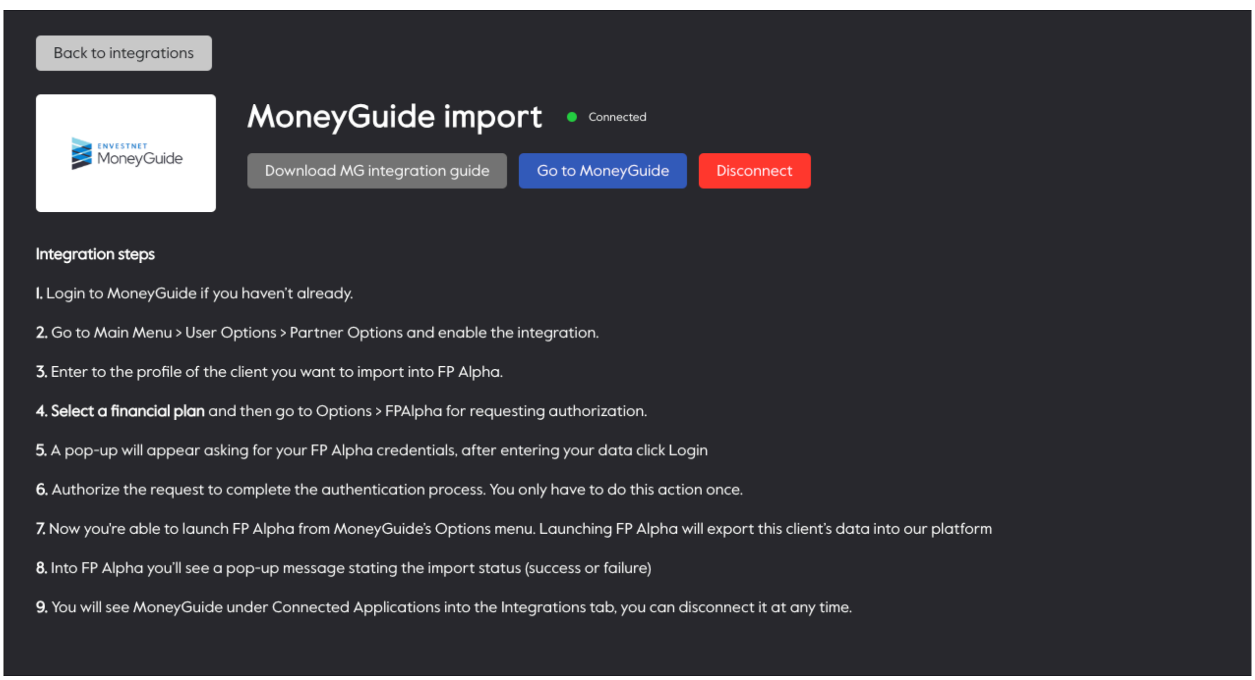


Step Five

You will see MoneyGuide with the Connected status into the Integrations tab.



To disconnect your MoneyGuide account, click on the card from the previous step and you'll see this screen, then click Disconnect



Note: Disconnecting your account will not delete the imported clients.

fp alpha

Data Mapping

Personal Information			
FPAlpha	**MGP**	**Required**	**Comments**
	Client		
Marital Status	About You/Client/Marital Status		
First Name	About You/Client/First Name	Yes	
Last Name	About You/Client/Last Name	Yes	
Email		Yes	
Gender	About You/Client/Gender	Yes	
Birthdate	About You/Client/Date of Birth	Yes	
Estate of residence	About You/Client/State of Residence	Yes	
Is client retired	About You/Client/Employment Status		Is retired if it says 'Retired'.
Occupation	About You/Client/Employment Status		
Net Worth Type			By default, it is a number.
Net Worth			it is the sum of the value of all assets
Net Worth Range			
Non Resident Alien			
	Co-Client (In Case Marital Status Is 'Married')		
First Name	About You/Co-Client/First Name	Yes	
Last Name	About You/Client/Last Name		
Email			
Gender	About You/Co-Client/Gender	Yes	
Birthdate	About You/Co-Client/Date of Birth	Yes	
Estate of residence	About You/Client/State of Residence	Yes	
Is client retired	About You/Co-Client/Employment Status		No, when this field is empty.
Occupation	About You/Co-Client/Employment Status		
Net Worth Type			By default, it is a number.

Net Worth			It is the same as the client
Net Worth Range			
Non Resident Alien			

Family Information			
FPAlpha	**MGP**	**Required**	**Comments**
Children			
Do the clients have children?			If children are found, it is 'Yes'; if not, 'No'.
Name	About You/Personal/Participants/First Name	Yes	
Date of birth	About You/Personal/Participants/Date of Birth		
Parent(s)			Automatically add the parents (Client and Co-Client).
Full time college student			
Disability?			
Grandchildren			
Do the clients have grandchildren?			If grandchildren are found, it is 'Yes'; if not, 'No'.
Name	About You/Personal/Participants/First Name	Yes	
Date of birth	About You/Personal/Participants/Date of Birth		
Other beneficiaries			
Do the clients want to add more beneficiaries?			If other members are found, it is 'Yes'; if not, 'No'.
Name	About You/Personal/Participants/First Name	Yes	
Relationship	About You/Personal/Participants/Relationship Type		

Assets Information			
FPAlpha	**MGP**	**Required**	**Comments**
			Real Estate
Nickname		Yes	3.- Business and Property Real Estate > - 9.- Future Assets - Property Future Home > Other 10.- Future Assets - Property Other Future Property > Other 19.- Home and Personal Assets Home > Primary Residence
Owner/Title		Yes	
Market Value		Yes	
Real Estate Type	-		
Location	-		
Cost Basis	-		
			Business
Name		Yes	2.- Business and Property Business > - 4.- Business and Property Other > -
Owner/Title		Yes	
Fair Market Value		Yes	
Structure	-		
Location			
Ownership Percentage			
			Retirement
Account Type		Yes	1.- Employer Retirement Plans 401(k) > 401(k) 2.- Employer Retirement Plans 403(b) > 403 (b) 3.- Employer Retirement Plans 457 > 457 Plan 5.- Employer Retirement Plans Profit Sharing > Other 6.- Employer Retirement Plans SARSEP-IRA > Other 7.- Employer Retirement Plans SEP-IRA > Other 8.- Employer Retirement Plans Simple-IRA >
Nickname		Yes	
Owner/Title		Yes	
Account Value		Yes	

Beneficiaries			Other 9.- Employer Retirement Plans Other Qualified > Other
Contingent Beneficiaries			10.- Employer Retirement Plans Other Employer > Other 11.- Individual Retirement Accounts Traditional IRA - Account > Traditional IRA 12.- Individual Retirement Accounts Traditional IRA - Fixed Annuity > Traditional IRA 13.- Individual Retirement Accounts Traditional IRA - Variable Annuity with GMWB > Traditional IRA 14.- Individual Retirement Accounts Traditional IRA - Variable Annuity > Traditional IRA 15.- Individual Retirement Accounts Traditional IRA - SEPP IRA - > Traditional IRA 16.- Individual Retirement Accounts Traditional IRA - Inherited IRA > Traditional IRA 17.- Individual Retirement Accounts Roth IRA - Account > Roth IRA 18.- Individual Retirement Accounts Roth IRA - Fixed Annuity > Roth IRA 19.- Individual Retirement Accounts Roth IRA - Variable Annuity with GMWB > Roth IRA 20.- Individual Retirement Accounts Roth IRA - Variable Annuity > Roth IRA 21.- Individual Retirement Accounts Roth IRA - Inherited IRA > Roth IRA 29.- Annuities & Tax-Deferred Products Other Tax-Deferred > Other 16.- Pension and Deferred Compensation Lump Sum Distribution > Other 17.- Pension and Deferred Compensation Deferred Compensation (Receiving Now) > Other 18.- Pension and Deferred Compensation Deferred Compensation (Future) > Other

Non Retirement			
Account Type		Yes	4.- Employer Retirement Plans Money Purchase > Bank/Savings/Checking 24.- Annuities & Tax-Deferred Products Fixed Annuity > Other 25.- Annuities & Tax-Deferred Products Indexed Annuity > Other 26.- Annuities & Tax-Deferred Products Variable Annuity > Other 27.- Annuities & Tax-Deferred Products Variable Annuity with GMWB > Other 30.- Taxable and/or Tax-Free Accounts Account > Brokerage/Taxable
Nickname		Yes	
Owner/Title		Yes	
Account Value		Yes	
Beneficiaries			
Contingent Beneficiaries			

Life Insurance			
Type		Yes	28.- Annuities & Tax-Deferred Products Variable Life > Whole/Cash Value 1.- Cash Value Life owned by Other Person or Entity :Universal Life > Whole/Cash Value 2.- Cash Value Life owned by Other Person or Entity :Variable Life > Whole/Cash Value 3.- Cash Value Life owned by Other Person or Entity :Whole Life > Whole/Cash Value 4.- Cash Value Life owned by Other Person or Entity :Other > Whole/Cash Value 8.- LIFE_INSURANCE > Term 9.- Non-Cash Value Life :Term Life > Term 10.- Non-Cash Value Life :Group Term > Term 11.- Non-Cash Value Life :Other > Whole/Cash Value 26.- LIFE_INSURANCE > Term 27.- LIFE_INSURANCE > Term 28.- LIFE_INSURANCE > Term 29.- LIFE_INSURANCE > Term 5.- Cash Value Life Universal Life > Whole/Cash Value 6.- Cash Value Life Variable Life > Whole/Cash Value 7.- Cash Value Life Whole Life > Whole/Cash Value
Nickname		Yes	
Policy Owner		Yes	
Death Benefit Amount		Yes	
Whose Life is Insured?			
Cash Value			
Beneficiaries			
Contingent Beneficiaries			

			8.- Cash Value Life Other Life > Whole/Cash Value 15.- Future Assets - Cash Death Benefit > Term
College Saving			
Type		Yes	22.- College Saving Plans Coverdell (CESA) Account > 529 Plan 23.- College Saving Plans 529 > Other 1.- 529 Savings Plan Account > 529 Plan
Plan Nickname		Yes	
Custodian		Yes	
Account Value		Yes	
Beneficiaries			
Contingent Beneficiaries			
Loan/Liability			
Type		Yes	1.- Vehicle Loan: Total Amount > Car Loan 2.- Vehicle Loan: Other > Car Loan 3.- Vehicle Loan: Car > Car Loan 4.- Vehicle Loan: Boat > Other 7.- Other Personal Debt: Securities Backed Loan > Other 9.- Other Personal Debt: Personal Note > Personal Loan 12.- Other Personal Debt: Education > Student Loan 13.- Other Personal Debt: Credit Cards > Other 14.- Personal Real Estate Loan: Total Amount > Home Loan 15.- Personal Real Estate Loan: > Home Loan 16.- Personal Real Estate Loan: Other > Home Loan 17.- Personal Real Estate Loan: > Home Loan 19.- Business Loan: Vehicle > Car Loan 20.- Business Loan: Total Amount > Other 21.- Business Loan: Other > Other 22.- Business Loan: Commercial Mortgage > Home Loan
Nickname		Yes	
Loan Owner		Yes	
Loan Amount		Yes	
Interest Rate		Yes	

			23.- Business Loan: Equipment > Other 24.- Business Loan: Working Capital > Other
Personal Property			
Type		Yes	11.- Future Assets - Cash Inheritance 12.- Future Assets - Cash Gift 13.- Future Assets - Cash Settlement / Award 14.- Future Assets - Cash Other Future Assets 20.- Home and Personal Assets Collectible 21.- Home and Personal Assets Personal Property 22.- Home and Personal Assets Vehicle 23.- Home and Personal Assets Other
Nickname		Yes	
Owner		Yes	
Amount		Yes	