

RIA registration and contract access guide

GETTING STARTED HAS NEVER BEEN EASIER

Welcome to Jackson®. We are pleased to serve you and your clients through our RIA and Wealth Managers platform. Registration is easy and allows you access to service existing commission- or advisory-based products. We also make it easy to access new fee-based products in a way that fits your chosen business model. Once you are registered, you have access to contract information, trading, billing, new business referrals, and more. Our guide walks you through everything you need to get started.



Jackson® is the marketing name for Jackson Financial Inc., Jackson National Life Insurance Company®, and Jackson National Life Insurance Company of New York®.

Not FDIC/NCUA insured • May lose value • Not bank/CU guaranteed
Not a deposit • Not insured by any federal agency



Managing annuities as an independent RIA



Jackson advisory annuities are designed to fit your unique business model. As your practice evolves and grows, our optimized products and services make incorporating annuities into your client's financial plans as easy as possible.

Jackson's team of experts, user-friendly technology, simple processes, and advisory products are simple to integrate into your business.

You will have access to the entire suite of [fee-based annuities](#) including fixed index, registered index-linked, and variable annuities.

To learn more about what's available to you, reach out to your Jackson representative.

What is an annuity? An annuity is a long-term, tax-deferred vehicle designed for retirement and is an insurance contract. Variable annuities and registered index-linked annuities involve investment risks and may lose value. Earnings are taxable as ordinary income when distributed. Individuals may be subject to a 10% additional tax for withdrawals before age 59½ unless an exception to the tax is met.

DID YOU KNOW?

Investment advisor representatives can still provide advice on all Jackson products through the use of a client authorization form

Managing and gaining access to your clients' existing annuities

The steps below outline the onboarding process for registered investment advisors (RIAs) and investment advisor representatives (IARs) that work through an outsourced insurance desk (OID). If your firm does not have an existing OID relationship, Jackson can provide a list of OID partners that have access to Jackson's products.

REGISTERING AS AN RIA

After establishing a relationship with an OID, the OID provides the RIA Onboarding Agreement form that will onboard your firm. Once this form is processed, a confirmation email is sent referencing the Jackson Producer ID for the RIA.

REGISTERING AS AN IAR

Once the onboarding is established for the RIA, the OID provides the Investment Advisor Representative Data Sheet to appoint the individual advisor (note that forms to onboard the RIA and IAR may be submitted at the same time). Once this form is processed, a confirmation email is sent to you referencing your Jackson Producer ID.

TRANSFERRING AND GAINING ACCESS TO IN-FORCE ADVISORY AND COMMISSION-BASED ANNUITY CONTRACTS

Once advisor registration is complete, adding an RIA/IAR to a policy is established by completing the Client Authorization form. The OID partner will help facilitate proper submission of this request.



Servicing commissionable and advisory contracts on jackson.com

- If you don't have a login through jackson.com, click **Sign In** on the home page and then choose **Register Now**.
- If an account already exists from a previous broker/dealer appointment, the username and password will remain the same.
- If you previously had a jackson.com login but cannot remember the username and/or password, you can reset those directly on the sign-in page. If you no longer have access to the email address that was attached to the login, our service team easily can update that information.

Note: For those who have current Jackson registrations with both a broker/dealer and an RIA, only one online account is needed. All business—both commissionable and advisory—will appear in the **Book of Business** tab.

New to our site?

Register Now

Sign In

Welcome

All fields are required

Username

Password

☐ Remember my username

Do not check if this is a public or shared device.

Continue

[→ Forgot Username](#)

[→ Sign in to Beneficiary Access Account](#)

[→ Forgot Password](#)

Setting up fee billing

- Log on to jackson.com to establish fee billing for eligible contracts. Under the **Fee Billing** tab, all advisory contracts that allow for direct billing will appear. Follow the prompts presented to **Review** and **Confirm**.

Note that some RIAs may not allow for IAR-level billing. Refer to your back office if the **Fee Billing** tab is not available.

- For electronic payment, submit an electronic funds transfer (EFT) form to customercare@jackson.com, otherwise advisory fees are sent via check. Fees are sent directly to the RIA, and the information needed on the EFT form is for the firm only.



Contract List										
3 contract(s) still need to be assigned to receive fee payment. View and assign them now >>										
7 Contract(s)					Billing Statements		2023	Oct	EXPORT	
Owner	Contract Number	Product	Fee Source	Billable Assets	Max Fee	Fee Amount	Billing Frequency	Last Cycle	Change History	Clear Fee
<input type="checkbox"/> Primary & Joint Testcasetwo	→ 1061627231	MarketProtector Advisory	Pro rata	\$50,173.31	1.50%	1.25%	Quarterly	11/03/2023	🔍	✍️
<input type="checkbox"/> Bob Test Trust	→ 1621012014	Perspective Advisory II	Pro rata	\$47,959.28	1.50%	--	--	10/07/2023	🔍	--
<input type="checkbox"/> Sunshiner, Sally	→ 2315200002	MarketProtector Advisory	Pro rata	\$102,729.84	1.50%	1.50%	Quarterly	10/07/2023	🔍	✍️
<input type="checkbox"/> Mpacasnine, Testcase	→ 1603264003	MarketProtector Advisory	Pro rata	\$412,239.21	1.50%	1.00%	Quarterly	10/07/2023	🔍	✍️
<input type="checkbox"/> Policytestthree, Ria	→ 1603263002	Perspective Advisory II	Pro rata	\$132,238.82	1.50%	1.00%	Quarterly	10/07/2023	🔍	✍️

Trades and reallocations

- Conducting trades and reallocations can be done online at jackson.com or over the phone with our Customer Care team. Please check with your RIA to determine whether this is allowed at the advisor level.
- Our mass-trading feature enables trades to be conducted for individual contracts or multiple contracts.

Access to manage contracts

After the OID makes product recommendations, it will fulfill the licensing, regulatory requirements, and suitability to write new contracts for the clients (contact your OID to ensure steps are properly followed). Once issued, the RIA/IAR has access to manage the contract.



LET'S GET STARTED

Before you know it, you'll be up and running

HAVE QUESTIONS OR NEED HELP?

Contact the RIA Business Development team at riabusinessdevelopment@jackson.com.

Before investing, investors should carefully consider the investment objectives, risks, charges, and expenses of the variable annuity and its underlying investment options. The current contract prospectus and underlying fund prospectuses provide this and other important information. Please contact your financial professional or the Company to obtain the prospectuses. Please read the prospectuses carefully before investing or sending money.

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Annuities are issued by Jackson National Life Insurance Company (Home Office: Lansing, Michigan) and in New York by Jackson National Life Insurance Company of New York (Home Office: Purchase, New York). Variable annuities are distributed by Jackson National Life Distributors LLC, member FINRA. May not be available in all states, and state variations may apply. These products have limitations and restrictions. Discuss them with your financial professional or contact Jackson for more information.

