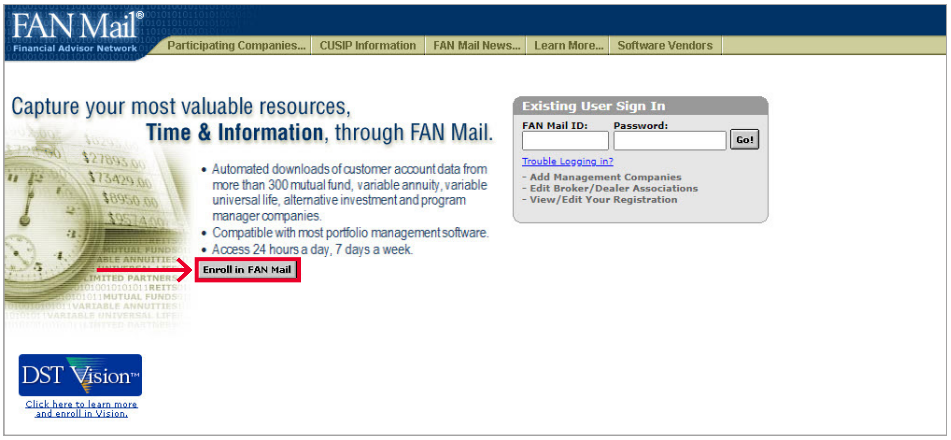
Setting up Jackson® in DST FAN Mail

The instructions outlined here will assist both new and registered users in setting up Jackson in DST FAN Mail.

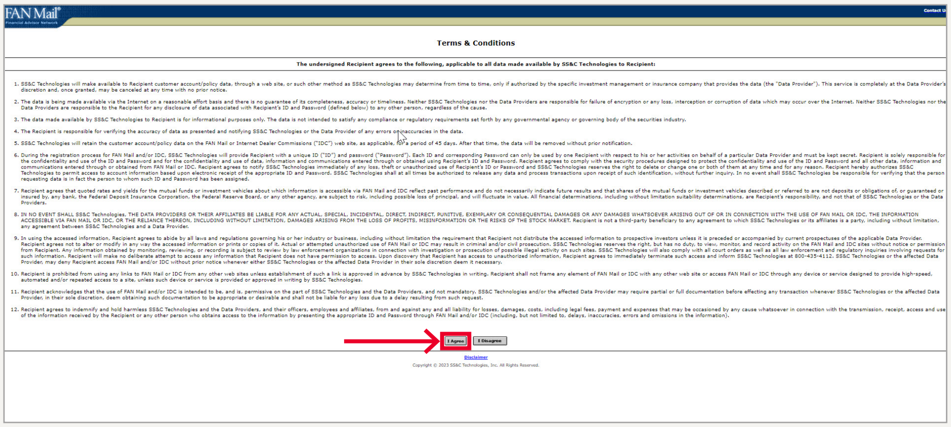
If you have already registered in DST FAN Mail—and simply need to add Jackson—please skip to the end of the document (page 8).

New users

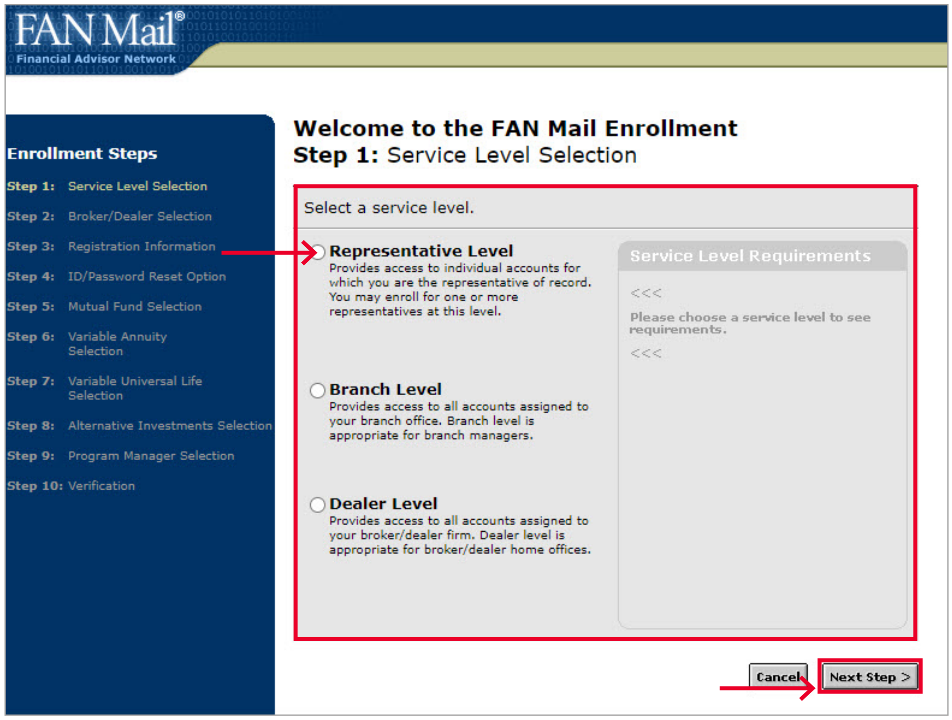
1. Go to http://www.dstfanmail.com and navigate to **Enroll in FAN Mail.**



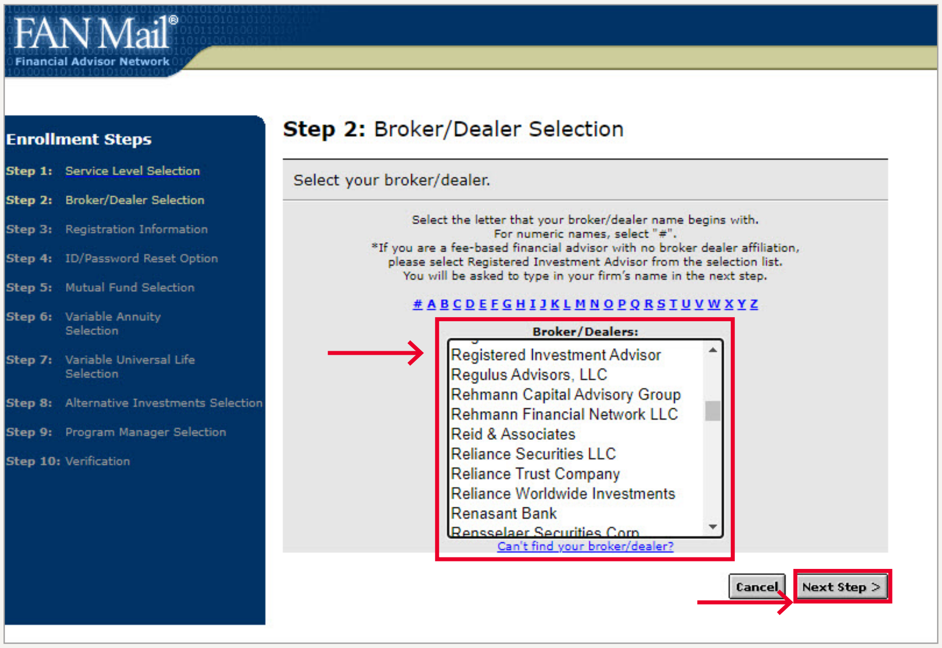
2. Read through the Terms & Conditions and select **I Agree** at the bottom of the page.



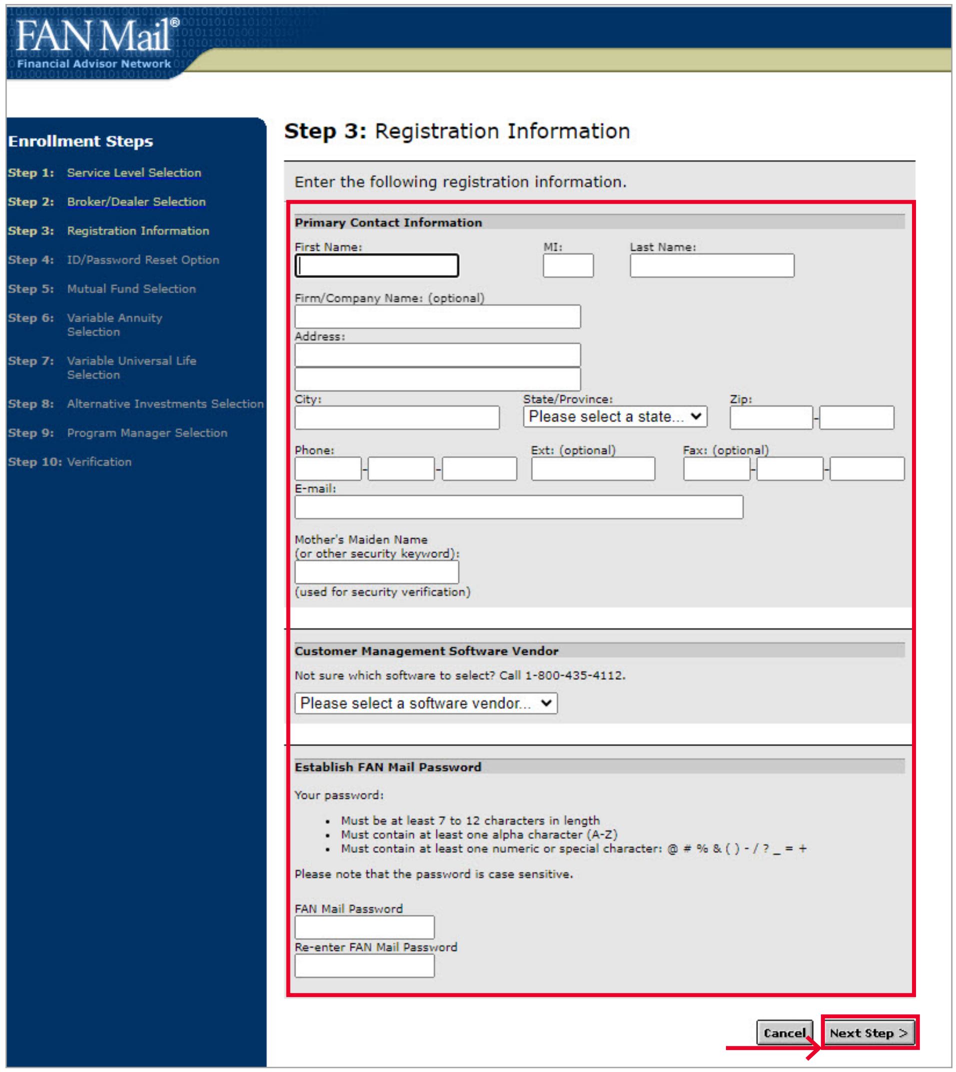
3. Select the correct service level **(Representative, Branch, or Dealer)**. In most cases, you should select **Representative Level,** unless you represent a branch or firm. If the required service level is not listed, contact FAN Mail support directly.



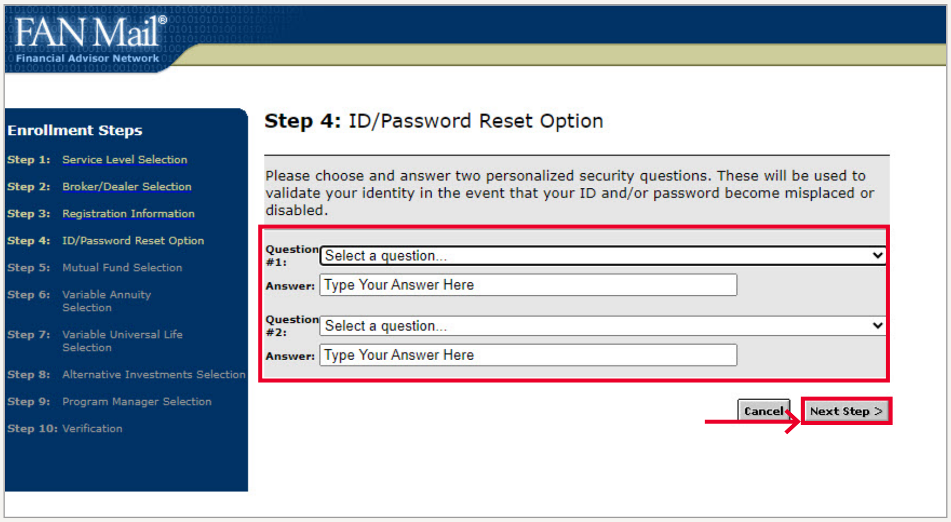
4. Select your **broker/dealer** association (depending on your BD, an authorization letter may be required). If you are an RIA, select the letter **R** and then choose **Registered Investment Advisor.**



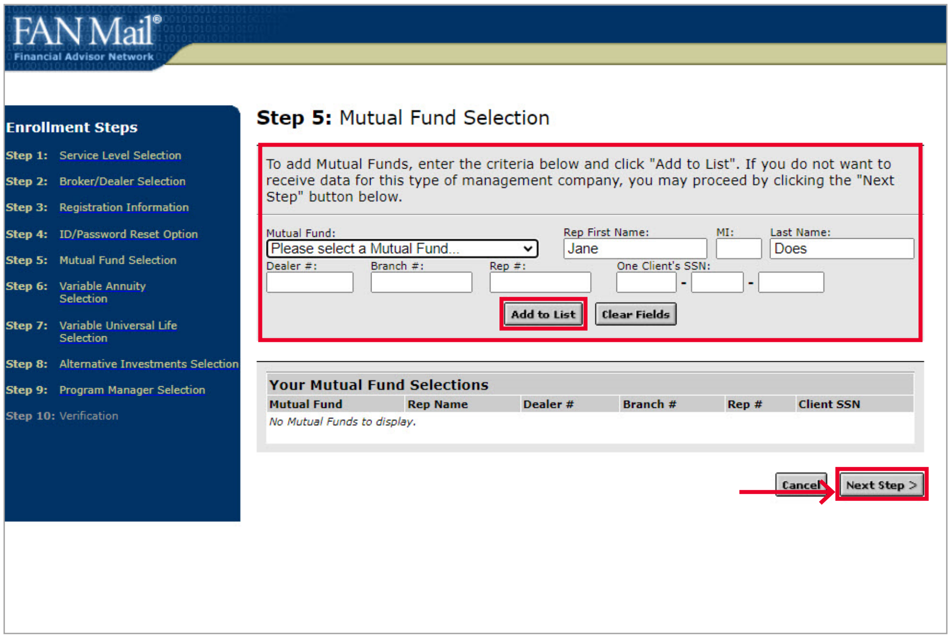
5. Complete the **Registration Information** (profile details, software vendor, and create a password).



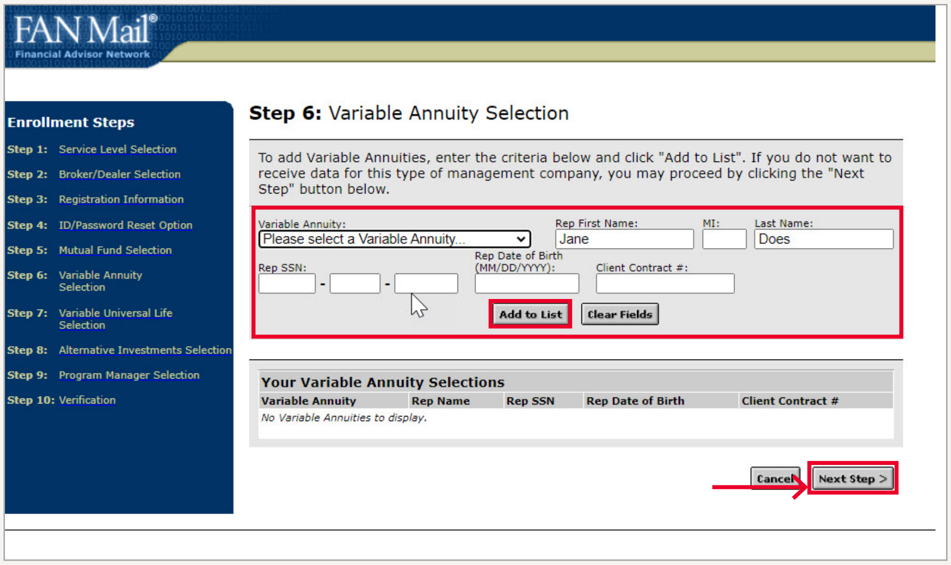
6. Complete two unique security questions.



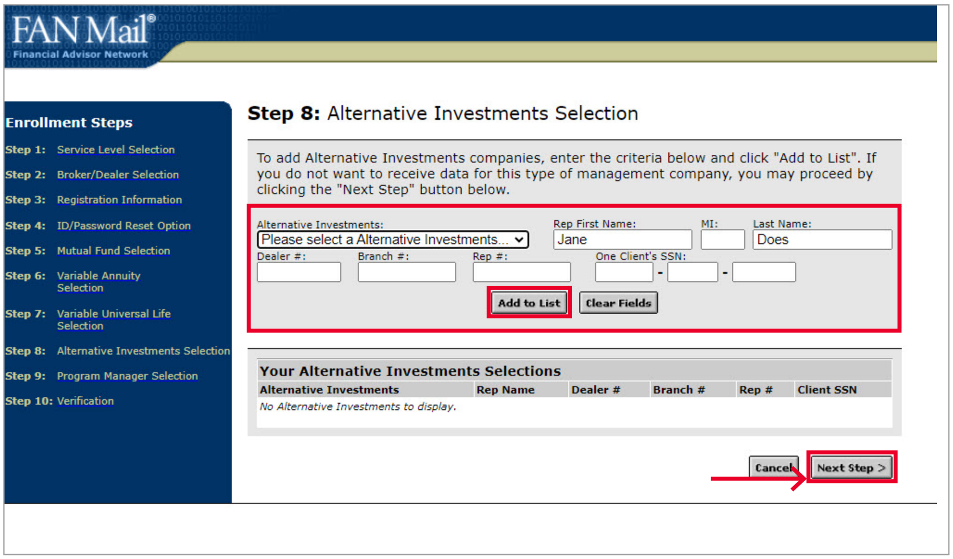
7. Select the **Mutual Fund** companies for which you would like to receive downloads (Dealer #, Branch #, Rep #, and a sample client SSN are required).



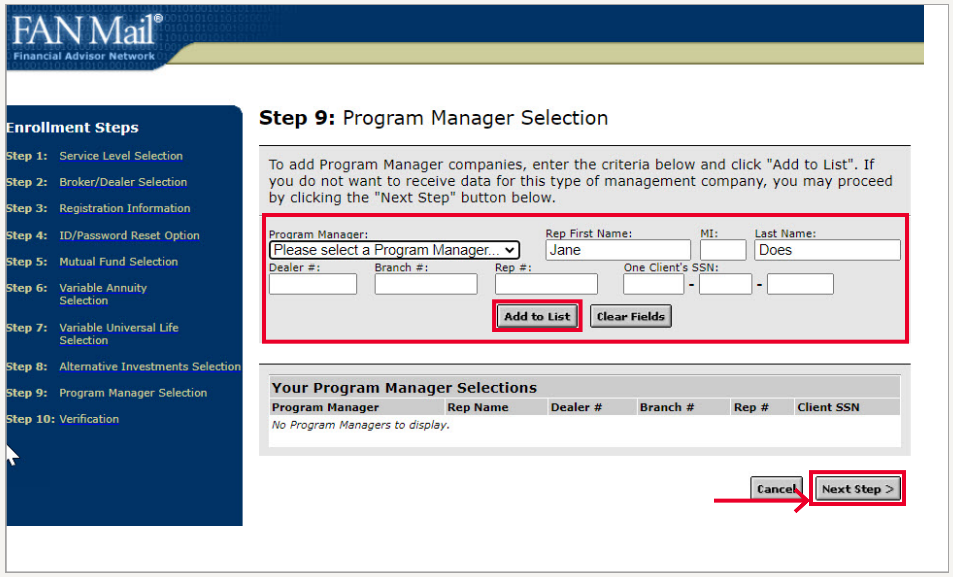
8. Select the **Variable Annuity** companies for which you would like to receive downloads (Rep SSN, Rep Date of Birth, and a sample Client Contract Number are required).



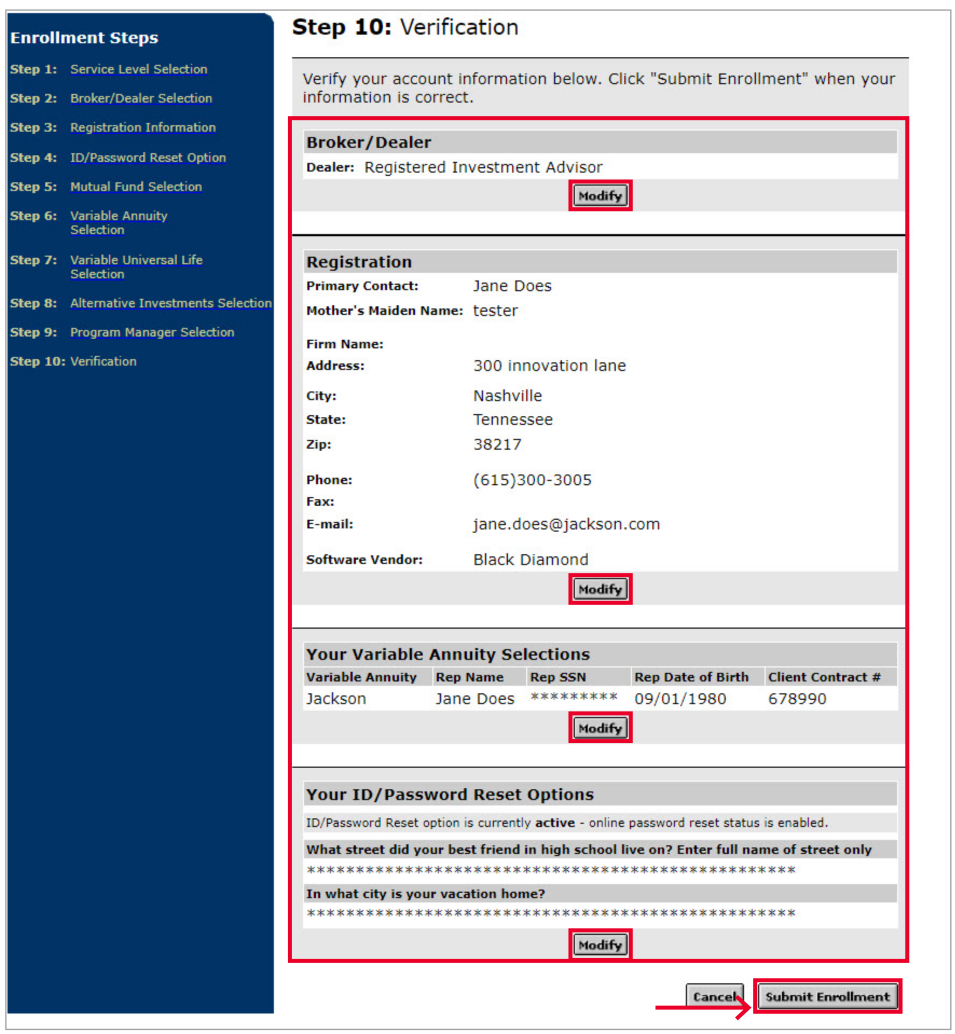
9. Select the **Alternative Investment** companies for which you would like to receive downloads (Dealer#, Branch #, Rep #, and a sample client SSN are required).



10. Select the **Program Manager** companies for which you would like to receive downloads (Dealer #, Branch #, Rep #, and a sample client SSN are required).



11. Double-check all previously entered information and confirm it is correct. Modify if necessary. When ready, click **Submit Enrollment.**



Registered users

ADDING COMPANY FEEDS

If you have already signed up for DST FAN Mail and want to add Jackson to the list of companies that can send you feeds, follow the steps listed below.

1. Go to the home page of the FAN Mail website and sign in using **Existing User Sign-In.**

2. Once you are signed in, you will be able to view your existing account on file and request that additions/changes be made to your download criteria (Rep # and client contract # are required).

3. For additional support, please contact FAN Mail directly.

JMC23706 11/25

JACKSON®