

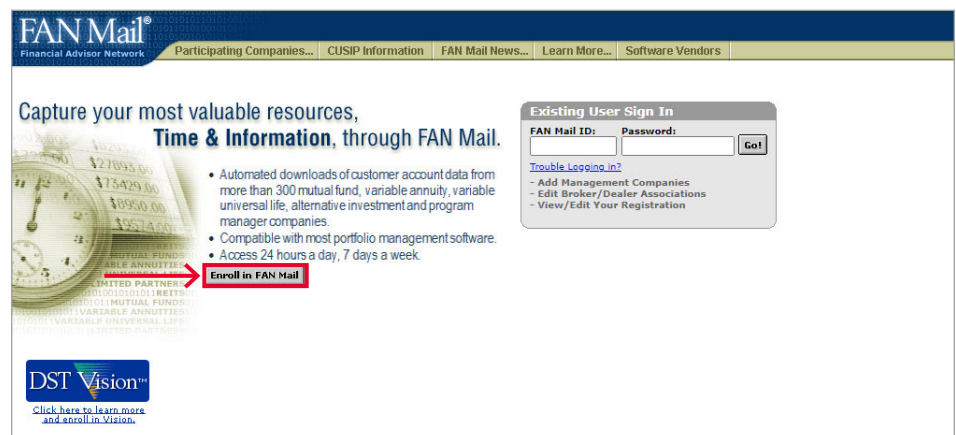
# Setting up Jackson® in DST FAN Mail

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).

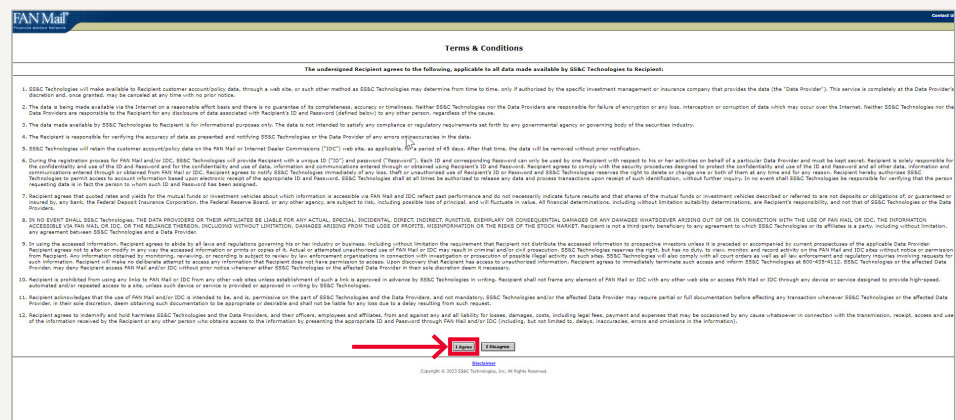
## New users

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



The screenshot shows the FAN Mail website interface. At the top, there's a navigation bar with links like 'Participating Companies...', 'CUSIP Information', 'FAN Mail News...', 'Learn More...', and 'Software Vendors'. The main content area features a large heading 'Capture your most valuable resources, Time & Information, through FAN Mail.' Below this, there's a list of benefits: 'Automated downloads of customer account data from more than 300 mutual fund, variable annuity, variable universal life, alternative investment and program manager companies.', 'Compatible with most portfolio management software.', and 'Access 24 hours a day, 7 days a week.' A red arrow points to a button labeled 'Enroll in FAN Mail'. To the right, there's a 'Existing User Sign In' box with fields for 'FAN Mail ID:' and 'Password:', and a 'Go!' button. Below the sign-in box, there's a link for 'Trouble Logging In?' and a list of links: 'Add Management Companies', 'Edit Broker/Dealer Associations', and 'View/Edit Your Registration'.

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



The screenshot shows the 'Terms & Conditions' page of the FAN Mail website. The page has a header with the FAN Mail logo and navigation links. The main content area is titled 'Terms & Conditions' and contains a list of terms. The first term states: 'The undersigned Recipient agrees to the following, applicable to all data made available by S&B Technologies to Recipient:'. The list includes 13 terms covering data availability, security, liability, and user responsibilities. At the bottom of the page, there are two buttons: 'I Agree' and 'I Disagree', with the 'I Agree' button highlighted by a red arrow. Below the buttons, there's a small copyright notice: 'Copyright © 2003 S&B Technologies, Inc. All Rights Reserved.'

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

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

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.

**FAN Mail®**  
Financial Advisor Network

**Enrollment Steps**

- Step 1: Service Level Selection
- Step 2: Broker/Dealer Selection
- Step 3: Registration Information
- Step 4: ID/Password Reset Option
- Step 5: Mutual Fund Selection
- Step 6: Variable Annuity Selection
- Step 7: Variable Universal Life Selection
- Step 8: Alternative Investments Selection
- Step 9: Program Manager Selection
- Step 10: Verification

**Welcome to the FAN Mail Enrollment**  
**Step 1: Service Level Selection**

Select a service level.

☒ **Representative Level**  
Provides access to individual accounts for which you are the representative of record. You may enroll for one or more representatives at this level.

☐ **Branch Level**  
Provides access to all accounts assigned to your branch office. Branch level is appropriate for branch managers.

☐ **Dealer Level**  
Provides access to all accounts assigned to your broker/dealer firm. Dealer level is appropriate for broker/dealer home offices.

**Service Level Requirements**

<<<  
Please choose a service level to see requirements.  
<<<

**Cancel** **Next Step >**

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**.

The screenshot shows the FAN Mail Financial Advisor Network interface. On the left is a vertical sidebar titled "Enrollment Steps" with a list of steps from Step 1 to Step 10. Step 2, "Broker/Dealer Selection", is highlighted. The main content area is titled "Step 2: Broker/Dealer Selection" and contains instructions to select a broker/dealer by letter. A red arrow points to a dropdown menu labeled "Broker/Dealers:" which lists several options, with "Registered Investment Advisor" at the top. Below the list is a link that says "Can't find your broker/dealer?". At the bottom right of the form are two buttons: "cancel" and "Next Step >".

**FAN Mail**  
Financial Advisor Network

**Enrollment Steps**

- Step 1: Service Level Selection
- Step 2: Broker/Dealer Selection**
- Step 3: Registration Information
- Step 4: ID/Password Reset Option
- Step 5: Mutual Fund Selection
- Step 6: Variable Annuity Selection
- Step 7: Variable Universal Life Selection
- Step 8: Alternative Investments Selection
- Step 9: Program Manager Selection
- Step 10: Verification

**Step 2: Broker/Dealer Selection**

Select your broker/dealer.

Select the letter that your broker/dealer name begins with.  
For numeric names, select "#".  
\*If you are a fee-based financial advisor with no broker/dealer affiliation, please select Registered Investment Advisor from the selection list.  
You will be asked to type in your firm's name in the next step.

# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

**Broker/Dealers:**

- Registered Investment Advisor
- Regulus Advisors, LLC
- Rehmann Capital Advisory Group
- Rehmann Financial Network LLC
- Reid & Associates
- Reliance Securities LLC
- Reliance Trust Company
- Reliance Worldwide Investments
- Renasant Bank
- Rensselaer Securities Corp.

[Can't find your broker/dealer?](#)

cancel Next Step >

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

**FAN Mail®**  
Financial Advisor Network

**Enrollment Steps**

Step 1: Service Level Selection

Step 2: Broker/Dealer Selection

**Step 3: Registration Information**

Step 4: ID/Password Reset Option

Step 5: Mutual Fund Selection

Step 6: Variable Annuity Selection

Step 7: Variable Universal Life Selection

Step 8: Alternative Investments Selection

Step 9: Program Manager Selection

Step 10: Verification

### Step 3: Registration Information

Enter the following registration information.

**Primary Contact Information**

First Name:  MI:  Last Name:

Firm/Company Name: (optional)

Address:

City:  State/Province:  Zip:

Phone:  Ext: (optional)  Fax: (optional)

E-mail:

Mother's Maiden Name  
(or other security keyword):  
  
(used for security verification)

**Customer Management Software Vendor**

Not sure which software to select? Call 1-800-435-4112.

**Establish FAN Mail Password**

Your password:

- Must be at least 7 to 12 characters in length
- Must contain at least one alpha character (A-Z)
- Must contain at least one numeric or special character: @ # % & ( ) - / ? \_ = +

Please note that the password is case sensitive.

FAN Mail Password

Re-enter FAN Mail Password

6. Complete two unique security questions.

**FAN Mail**  
Financial Advisor Network

**Enrollment Steps**

- Step 1: Service Level Selection
- Step 2: Broker/Dealer Selection
- Step 3: Registration Information
- Step 4: ID/Password Reset Option
- Step 5: Mutual Fund Selection
- Step 6: Variable Annuity Selection
- Step 7: Variable Universal Life Selection
- Step 8: Alternative Investments Selection
- Step 9: Program Manager Selection
- Step 10: Verification

**Step 4: ID/Password Reset Option**

Please choose and answer two personalized security questions. These will be used to validate your identity in the event that your ID and/or password become misplaced or disabled.

Question #1: Select a question...  
Answer: Type Your Answer Here

Question #2: Select a question...  
Answer: Type Your Answer Here

Cancel Next Step >

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

**FAN Mail**  
Financial Advisor Network

**Enrollment Steps**

- Step 1: Service Level Selection
- Step 2: Broker/Dealer Selection
- Step 3: Registration Information
- Step 4: ID/Password Reset Option
- Step 5: Mutual Fund Selection
- Step 6: Variable Annuity Selection
- Step 7: Variable Universal Life Selection
- Step 8: Alternative Investments Selection
- Step 9: Program Manager Selection
- Step 10: Verification

**Step 5: Mutual Fund Selection**

To add Mutual Funds, enter the criteria below and click "Add to List". If you do not want to receive data for this type of management company, you may proceed by clicking the "Next Step" button below.

Mutual Fund: Please select a Mutual Fund... Rep First Name: Jane MI: Last Name: Does  
Dealer #: Branch #: Rep #: One Client's SSN: - -

Add to List Clear Fields

**Your Mutual Fund Selections**

Mutual Fund	Rep Name	Dealer #	Branch #	Rep #	Client SSN
No Mutual Funds to display.					

Cancel Next Step >

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).

**FANMail®**  
Financial Advisor Network

**Enrollment Steps**

- Step 1: Service Level Selection
- Step 2: Broker/Dealer Selection
- Step 3: Registration Information
- Step 4: ID/Password Reset Option
- Step 5: Mutual Fund Selection
- Step 6: Variable Annuity Selection
- Step 7: Variable Universal Life Selection
- Step 8: Alternative Investments Selection
- Step 9: Program Manager Selection
- Step 10: Verification

**Step 6: Variable Annuity Selection**

To add Variable Annuities, enter the criteria below and click "Add to List". If you do not want to receive data for this type of management company, you may proceed by clicking the "Next Step" button below.

Variable Annuity:  Rep First Name:  MI:  Last Name:   
 Rep SSN:  -  -  Rep Date of Birth (MM/DD/YYYY):  Client Contract #:

**Your Variable Annuity Selections**

Variable Annuity	Rep Name	Rep SSN	Rep Date of Birth	Client Contract #
No Variable Annuities to display.				

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

**FANMail®**  
Financial Advisor Network

**Enrollment Steps**

- Step 1: Service Level Selection
- Step 2: Broker/Dealer Selection
- Step 3: Registration Information
- Step 4: ID/Password Reset Option
- Step 5: Mutual Fund Selection
- Step 6: Variable Annuity Selection
- Step 7: Variable Universal Life Selection
- Step 8: Alternative Investments Selection
- Step 9: Program Manager Selection
- Step 10: Verification

**Step 8: Alternative Investments Selection**

To add Alternative Investments companies, enter the criteria below and click "Add to List". If you do not want to receive data for this type of management company, you may proceed by clicking the "Next Step" button below.

Alternative Investments:  Rep First Name:  MI:  Last Name:   
 Dealer #:  Branch #:  Rep #:  One Client's SSN:  -  -

**Your Alternative Investments Selections**

Alternative Investments	Rep Name	Dealer #	Branch #	Rep #	Client SSN
No Alternative Investments to display.					

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

**FAN Mail®**  
Financial Advisor Network

**Enrollment Steps**

Step 1: Service Level Selection

Step 2: Broker/Dealer Selection

Step 3: Registration Information

Step 4: ID/Password Reset Option

Step 5: Mutual Fund Selection

Step 6: Variable Annuity Selection

Step 7: Variable Universal Life Selection

Step 8: Alternative Investments Selection

**Step 9: Program Manager Selection**

Step 10: Verification

### Step 9: Program Manager Selection

To add Program Manager companies, enter the criteria below and click "Add to List". If you do not want to receive data for this type of management company, you may proceed by clicking the "Next Step" button below.

Program Manager: Please select a Program Manager... Rep First Name: Jane MI:  Last Name: Does

Dealer #:  Branch #:  Rep #:  One Client's SSN:  -  -

**Your Program Manager Selections**

Program Manager	Rep Name	Dealer #	Branch #	Rep #	Client SSN
No Program Managers to display.					

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

**Enrollment Steps**

Step 1: Service Level Selection

Step 2: Broker/Dealer Selection

Step 3: Registration Information

Step 4: ID/Password Reset Option

Step 5: Mutual Fund Selection

Step 6: Variable Annuity Selection

Step 7: Variable Universal Life Selection

Step 8: Alternative Investments Selection

Step 9: Program Manager Selection

**Step 10: Verification**

### Step 10: Verification

Verify your account information below. Click "Submit Enrollment" when your information is correct.

**Broker/Dealer**

Dealer: Registered Investment Advisor

**Registration**

Primary Contact: Jane Does

Mother's Maiden Name: tester

Firm Name:

Address: 300 innovation lane

City: Nashville

State: Tennessee

Zip: 38217

Phone: (615)300-3005

Fax:

E-mail: jane.does@jackson.com

Software Vendor: Black Diamond

**Your Variable Annuity Selections**

Variable Annuity	Rep Name	Rep SSN	Rep Date of Birth	Client Contract #
Jackson	Jane Does	*****	09/01/1980	678990

**Your ID/Password Reset Options**

ID/Password Reset option is currently **active** - online password reset status is enabled.

What street did your best friend in high school live on? Enter full name of street only

\*\*\*\*\*

In what city is your vacation home?

\*\*\*\*\*

# 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.

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. Contact Jackson for more information.