



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).



 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.

	Terms & Conditions
	The underrigened Racipient agrees to the following, applicable to all data made available by SS&C Technologies to Recipient;
SS&C Technologies will make available t discretion and, once granted, may be ca	a Register continue assumpting of the through a set alls, result the method as IEEE Technologies may determine from time to time, only if authorized by the specific investment or insurance, company that provides the data (bits "Seta Provides"). This service is completely at the Data Set and the specific investment or insurance, company that provides the data (bits "Seta Provides").
The data is being made available via the Data Providers are responsible to the Re	Literate to a reasolab effect bala and there is to parameter of to complement, perture or the table 1550. Technologia nor the CDB Providers are reaposable for failure of encryption or any loss, interruption of data which may occur over the Internet. Betther 2550. Technologic port the CDB Providers are reaposable for failure of encryption or any loss, interruption of data which may occur over the Internet. Betther 2550. Technologic port the CDB Providers are reaposable for failure of encryption or any loss, interruption of data which may occur over the Internet. Betther 2550. Technologic port the CDB Providers are reaposable for failure of encryption or any loss, interruption or any los
The data made available by 555.C Techn	ologies to flacipient is for informational purposes only. The data is not intended to satisfy any compliance or repulatory nequinements ait forth by any governmental approx or poverning body of the securities industry.
The Recipient is responsible for verifying	; the accuracy of data as presented and notifying 558.C Technologies or the Data Provider of any errors oppracturaties in the data.
SS&C Technologies will retain the custor	ner account/policy data on the FAN Nail or Internet Dealer Commissions (IDC') web site, as applicable, B ^{F2} paried of 43 days. After that time, the data will be removed without prior notification.
During the registration process for FAV the confidentiality and use of the ID and communications entered through or obti- Technologies to permit access to accour requesting data is in fact the person to	This disk (1) SESS behaviour of provide provide provide provide the second transmission of the second transmission of provide
Recipient agrees that quoted rates and insured by, any bank, the Federal Depor Providens.	pilds for the makes how the second or investment which a block shick hids makes in Second be at the performance and do not necessarily indicate fature makes and that chanse of the makes fature investment which a described or referred to are set deposite or ablgebox or ablgebox. All fear and and makes all fear and and that makes all fear ables to a block and and and the makes all fear ables to a block and and and the makes all fear ables to a block and the makes all fear ables to a block and the makes all fear ables to a block and the makes all fear ables to a block and the makes all fear ables at the makes at the ma
IV NO EVENT SHALL SS&C Technologies ACCESSIBLE VIA FAN MAIL OR IDC. OR any agreement between SS&C Technolo	THE DAY NERVOUSES ON THEM APPLICATES BE LARKE FOR ANY ACTUME, DESCH, INCIDENTE, COMPLEX, EXCHINANTION CONSEQUENTING, DAMAGES ON ANY DAMAGES INARTONIES ANDSING OUT ON IN CONNECTION WITH THE USE OF AN HALL ON DC, THE INFORMATION ON THE SERIES OF THE STOCK MARKET Request in not a three-party beneficiary to any agreement to which SSIC thorning we not a efficient is specification on the Lass of Application on the Lass of Applic
In using the accessed information, Recip Recipient agrees not to aber or modify in from Recipient. Any information obtains such information, Recipient vill make no Providen, may deny Recipient access PAT	set space to address of a low of spaces process process to be indexed on address of the state of
Recipient is prohibited from using any li automated and/or repeated access to a	As to FAN Test or DC from any data volts tas values assistability as a provent in advance by SBC Technologies in writing. Required fall real from any element of FAN Test or IDC write any cleanest of FAN Test or IDC write any cleanest of FAN Test or IDC write any data value of a source data value of the provide test or IDC write any cleanest of FAN Test or IDC write any cleanest or ID
Recipient acknowledges that the use of Provider, in their sole discretion, deem o	400 Hall and/u IDC is intended to be, and is, permittive on the gard of SELC Enclosinges and the Data Providers, and not mandatory, SELC Technologies and the Data Provider may require gards of AUI documentation being any transaction vibrative SELC Technologies or the affect Hallway cash & concentration to be apprecision or deviced and the SEL and Augustanty from and requires (SELC Technologies and the Data Provider may require gards) of AUI documentation being any transaction vibrative SELC Technologies and the Out
Recipient agrees to indemnify and hold of the information received by the Recip	harmines GEGS Trainclopes and the bobs Providers, and their officare, employees and affitable, from and against any and all habity for losses, demanding, costs, including legal free, payment and exponent that regulate costanciated by vary cases whatever in connection with the transmission, neeps, and and a ray of the prevention the approxements of the approxements
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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

 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®



 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.

FAN Mail® Step 2: Broker/Dealer Selection Enrollment Steps Step 1: Service Level Selection Select your broker/dealer. Step 2: Broker/Dealer Selection 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 Registred 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 Step 6: Variable Annuity Selection Broker/Dealers: € Registered Investment Advisor Step 7: Variable Universal Life Selection 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 Corn Can't find your broker/dealer? Cancel Next Step >

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

FAN Mail®

Step 3: Registration Information

l: <u>S</u>	ervice Level Selection	Enter the following registration information.
в	roker/Dealer Selection	
	egistration Information	Primary Contact Information
	D/Password Reset Option	First Name: MI: Last Name:
	lutual Fund Selection	Firm/Company Name: (optional)
v s	ariable Annuity election	Address:
v s	ariable Universal Life election	
	lternative Investments Selection	City: State/Province: Zip:
	rogram Manager Selection	
	erification	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. Please select a software vendor V
		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
		Cancel Next Step :

6. Complete two unique security questions.

For the service Level Selection For Service Reset Option Servi

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

ep 1: Service Level Selection rep 2: Broker/Dealer Selection ep 3: Registration Information ep 4: ID/Password Reset Option ep 5: Mutual Funds Per 5: Mutual Funds Per 6: Variable Annuity Selection Branch #: ep 7: Variable Universal Life Selection ep 8: ep 9: Program Manager Selection ep 10: Verification Vour Mutual Funds to display.	nroll	ment Steps	Step 5: Mu	tual Fund Sele	ection			
ep 2: Broker/Dealer Selection ep 3: Registration Information ep 4: ID/Password Reset Option ep 5: Mutual Funds ep 5: Mutual Funds Pelease select a Mutual Fund Jane Dealer #: Branch #: P 7: Variable Annuity Selection Branch #: ep 8: Alternative Investments Selection ep 9: Program Manager Selection ep 10: Verification Your Mutual Fund Variable Annuity Selection ep 8: Alternative Investments Selection ep 9: Program Manager Selection ep 10: Verification Vour Mutual Fund Rep Name Dealer # Branch # Not Mutual Funds to display.	ep 1:	Service Level Selection	To add Mutual	Funds, enter the cr	iteria below ar	d click "Add to	List". If you do	not want to
step * Registration Information ep 4: ID/Password Reset Option ep 5: Mutual Fund Selection ep 5: Mutual Fund Selection ep 6: Variable Annuity selection Branch #: ep 7: Variable Universal Life selection Add to List ep 9: Program Manager Selection ep 10: Verification	ep 2:	Broker/Dealer Selection	receive data fo	r this type of mana	gement compa	any, you may p	roceed by click	ing the "Next
ep 4: ID/Password Reset Option ep 5: Mutual Fund Selection ep 6: Variable Annuity Selection ep 7: Variable Universal Life Selection ap 8: Alternative Investments Selection ap 9: Program Manager Selection ap 10: Verification Variable Universal Life selection ap 9: Program Manager Selection P 10: Verification Your Mutual Fund Selections Mutual Funds to display.	ep 3:	Registration Information	Step" button b	elow.				
ep 5: Mutual Fund Selection ep 6: Variable Annuity Selection Branch #: ep 7: Variable Universal Life Selection Add to List ep 8: Alternative Investments Selection ep 9: Program Manager Selection ep 10: Verification	ep 4:	ID/Password Reset Option	Mutual Fund:		Rep Fi	st Name:	MI: Last N	ame:
ep 6: Variable Annuity Selection ep 7: Variable Universal Life Selection ep 8: Alternative Investments Selection ep 9: Program Manager Selection ep 10: Verification Vour Mutual Fund Selections Mutual Fund Rep Name Dealer # Branch # Rep # Client SS No Mutual Funds to display.	ep 5:	Mutual Fund Selection	Please select a Dealer #:	Mutual Fund Branch #: Re	Jane	One Client's SS	U Does	;
ep 7: Variable Universal Life Selection ep 8: Alternative Investments Selection ep 9: Program Manager Selection ep 10: Verification Vour Mutual Fund Selections Mutual Fund Rep Name Dealer # Branch # Rep # Client St No Mutual Funds to display.	ep 6:	Variable Annuity Selection					-	
sp 9: Program Manager Selection sp 9: Program Manager Selection p 10: Verification Your Mutual Fund Rep Name Dealer # Branch # Rep # Client SS No Mutual Funds to display.	ep 7:	Variable Universal Life Selection			Add to List	Clear Fields		
p 9: Program Manager Selection p 10: Verification Vour Mutual Fund Rep Name Dealer # Branch # Rep # Client SS No Mutual Funds to display. Cancel	p 8:	Alternative Investments Select	ion					
pp 10: Verification Mutual Fund Rep Name Dealer # Branch # Rep # Client SS			Your Mutual	Fund Selections	1.1.2.2.2.2.2.2.2.2.2.2.2.2.2.2.2.2.2.2	In the second second	L-992255792 10	
Cancel	sp 9:	Program Manager Selection	Mutual Fund	Rep Name	Dealer #	Branch #	Rep # C	lient SSN
Cancel	tep 9:	Program Manager Selection	riacourrana	display				
	е р 9: ер 10	Program Manager Selection : Verification	No Mutual Funds to	o display.				
	ер 9: ер 10	Program Manager Selection : Verification	No Mutual Funds to	, uispiay.			Can	cel Next Step
	ер 9: ер 10	Program Manager Selection : Verification	No Mutual Funds to	у изриау.			Can	Next Step
	tep 9: tep 10	Program Manager Selection : Venification	No Mutual Funds to	а бізріаў.			Can	Next Step

 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).

Enrollment Steps	Step 6: Varial	ole Annuity Sel	ection		
Step 1: Service Level Selection	To add Variable Ar	muities, enter the cr	iteria below and click	"Add to Lis	t". If you do not want to
Step 2: Broker/Dealer Selection	receive data for th	is type of managem	ent company, you ma	y proceed b	by clicking the "Next
Step 3: Registration Information	Step" button below	v.			
step 4: ID/Password Reset Option	Variable Annuity:		Rep First Name:	MI:	Last Name:
tep 5: Mutual Fund Selection	Please select a Var	Rep Da	Jane te of Birth		Does
itep 6: Variable Annuity Selection	Rep SSN:	(MM/DE	D/YYYY): Client Contra	act #:]
tep 7: Variable Universal Life Selection		Ac	ld to List Clear Fields		
tep 8: Alternative Investments Select	ion				
tep 9: Program Manager Selection	Your Variable A	nuity Selections			
Step 10: Verification	Variable Annuity	Rep Name R	ep SSN Rep Date of I	Birth	Client Contract #
		10 A			

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

rollment Steps	Step 8: Alternative Investments Selection
p 1: Service Level Selection	To add Alternative Investments companies, enter the criteria below and click "Add to List". If
p 2: Broker/Dealer Selection	you do not want to receive data for this type of management company, you may proceed by
ep 3: Registration Information	clicking the "Next Step" button below.
ep 4: ID/Password Reset Option	Alternative Investments: Rep First Name: MI: Last Name:
ep 5: Mutual Fund Selection	Please select a Alternative Investments Dealer #: Branch #: Rep #: One Client's SSN: Dealer #: Deale
ep 6: Variable Annuity Selection	
ep 7: Variable Universal Life Selection	Add to List Clear Fields
ep 8: Alternative Investments Selection	
p 9: Program Manager Selection	Your Alternative Investments Selections
ep 10: Verification	Alternative Investments Rep Name Dealer # Branch # Rep # Client SSN
	No Alternative Investments to display.
	Cancel Next Step

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

nrollment Steps	Step 9: Program	n Manager S	Selection			
p 1: Service Level Selection	To add Program Man	ager companies	enter the cri	teria below an	d click "A	dd to List" If
p 2: Broker/Dealer Selection	you do not want to r	eceive data for th	his type of m	anagement co	mpany, y	ou may proceed
p 3: Registration Information	by clicking the "Next	Step" button be	low.			
4: ID/Password Reset Option	Program Manager:		Rep First Nam	ie: MI	: Last	Name:
5: Mutual Fund Selection	Please select a Progra	am Manager ✓	Jane	One Client's SSN	Doe	s
6: Variable Annuity Selection				<u> </u>	-	
7: Variable Universal Life		Add	to List Clea	r Fields		
Selection						
Selection 8: Alternative Investments Select	tion					
Selection 8: Alternative Investments Select 9: Program Manager Selection	ion Your Program Mar	ager Selection	s			
Selection p 8: Alternative Investments Select p 9: Program Manager Selection p 10: Verification	Your Program Man Program Manager	Rep Name	S Dealer #	Branch #	Rep #	Client SSN
Selection tep 8: Alternative Investments Select tep 9: Program Manager Selection tep 10: Verification	Your Program Mar Program Manager	Rep Name	S Dealer #	Branch #	Rep #	Client SSN

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

Enrollment Steps	Step 10: Verification					
Step 1: Service Level Selection	Verify your account information below. Click "Submit Enrollment" when your					
Step 2: Broker/Dealer Selection	information is correct.					
Step 3: Registration Information	Broker/Dealer					
Step 4: ID/Password Reset Option	Dealer: Registered Investment Advisor					
Step 5: Mutual Fund Selection	Modify					
Step 6: Variable Annuity Selection						
Step 7: Variable Universal Life	Registration					
Sten 8. Alternative Investments Se	Primary Contact: Jane Does					
Step 0: Program Manager Selection	Mother's Maiden Name: tester					
Step 9: Program Manager Selection	Firm Name:					
Step 10: Vernication	Address: 300 innovation lane					
	City: Nashville					
	State: Tennessee					
	Zip: 38217					
	Phone: (615)300-3005					
	Fax:					
	Jane. does wjackson. 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?					

	Modify					
	Cancel 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.
- 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.



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