

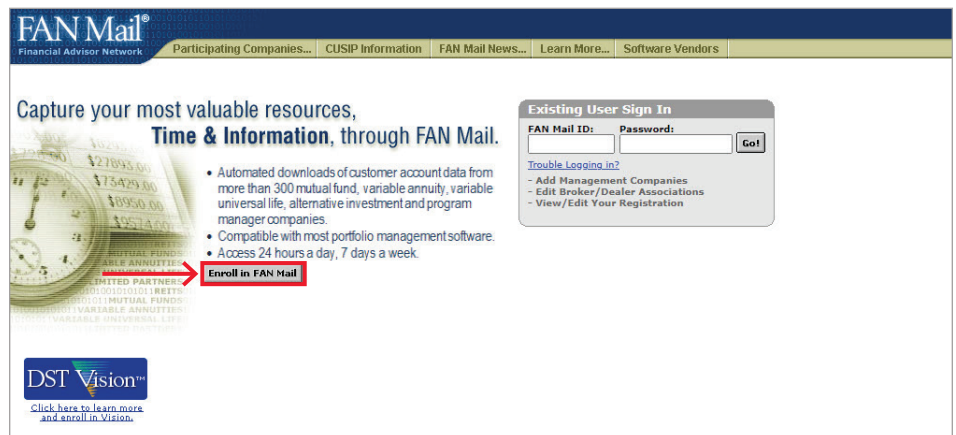
Setting up Jackson® in DST FAN Mail

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**.

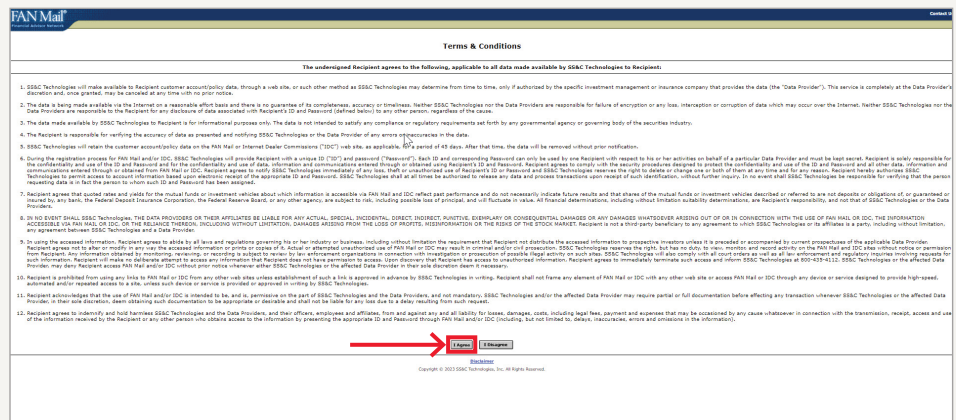


The screenshot shows the FAN Mail website interface. At the top, there are navigation links: "Participating Companies...", "CUSIP Information", "FAN Mail News...", "Learn More...", and "Software Vendors". The main content area features a large heading: "Capture your most valuable resources, Time & Information, through FAN Mail." Below this, there are several bullet points:

- 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.
- 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 is a "Existing User Sign In" form with fields for "FAN Mail ID:" and "Password:", a "Go!" button, and a "Trouble Logging In?" link. Below the sign-in form are links for "Add Management Companies", "Edit Broker/Dealer Associations", and "View/Edit Your Registration". At the bottom left, there is a "DST Vision" logo with the text "Click here to learn more and enroll in Vision."

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

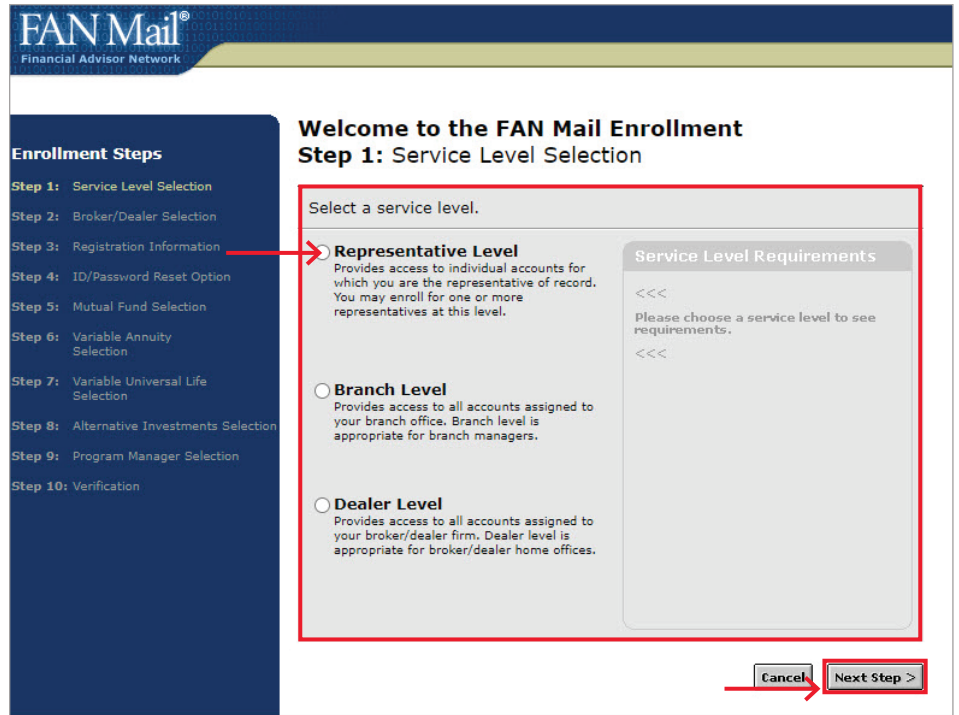


The screenshot shows the "Terms & Conditions" page on the FAN Mail website. The page title is "Terms & Conditions" and it states "The undersigned Recipient agrees to the following, applicable to all data made available by SSC Technologies to Recipient:". The page contains 13 numbered terms and conditions. At the bottom of the page, there are two buttons: "I Agree" and "I Disagree". A red arrow points to the "I Agree" button. The footer of the page includes the text "© 2003 SSC 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.



- 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**.

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).

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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
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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
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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
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Enrollment Steps

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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 #:
Add to List **Clear Fields**

Your Variable Annuity Selections

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

Cancel **Next Step >**

- 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

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- Step 7: Variable Universal Life Selection
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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: - -
Add to List **Clear Fields**

Your Alternative Investments Selections

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).

FANMail
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Enrollment Steps

- Step 1: Service Level Selection
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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: Rep First Name: MI: Last Name:
 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**.

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- 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.