

Advent Data Feed Request Process

Linking:

Advisor must request a Direction Letter from Advent Connection. If the advisor is not currently set up on ACD (Advent Custodial Data), they must reach out to their Advent Sales Rep.

Each ACD advisor also has a log in for the Advent Connection and due to this the direction letter that they request automatically populates a direction letter with their company name and the most current date on it. It also helps Advent track who is paying for ACD, who needs to pay for it, etc. Advisors would also need to complete the set up wizard for the JeffNat feed as well if they have not done so to trigger “entitlements” that help get JeffNat data on Advent’s end.

An advisor *CANNOT* request to link through a JeffNat representative.

If a client comes to JeffNat and asks to get linked, JeffNat can simple ask them this question; ***are you a current Advent Custodial Data client?***

1. Yes: Please log onto Advent Connection to request to add the feed and submit the direction letter to the number on the bottom of the direction letter.
2. No: Please reach out to your Advent sales rep.

Turnaround:

Advent usually has a 48-hour turnaround time once they get the direction letter back from the advisor to send to JeffNat.

However, Advent usually does this pretty quickly and within 24 hours. Once Advent sends the direction letter to JeffNat, they will wait to get the routing code (Advisor ID) from JeffNat. Once Advent receives the routing code, they will add it on their end and data should flow the next business day.

After initial set up:

An Advisor will **automatically receive an Advent feed for any future contracts** added under their Advisor ID after the first feed is established. However, it is Advents process to request a link for any additional contracts with JeffNat. Therefore, JeffNat may receive a request after the advisor has their first contract set up, which is fine.