

Investnet Data Feed Request Process

Linking:

Step 1:

The Advisor will need to request the Jefferson National Feed by sending an email to ma_service_team@jeffnat.com with the following verbiage:

Please accept this email as my authorization to begin sending data feeds to Envestnet for assets held at Jefferson National. My Jefferson National Advisor/Firm ID number is _____.

Step 2:

Advisor must request an auto-claim through the Advisor Services team by supplying the Jefferson National Advisor/Firm ID number.