

Orion Data Feed Request Process

Linking:

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 Orion Advisor Services, LLC for assets held at Jefferson National. We would like data sent from our Firm Name _____, Firm ID _____. Please also notify Orion at ReconService@orionadvisor.com when set up is complete to the SFTP site and the name of the file being sent for our firm/advisor.

Orion Trading Request Process

Process in order to trade on the Orion Platform

Process

Step 1:

The Advisor will need to contact their Territory representative, or email ma_service_team@jeffnat.com, to request access to the Orion trading functionality.

Step 2:

Place trades using the Orion software. Once the trade file is created, log in to your Jefferson National account and upload the trade file via the Account Management drop down. You will need to click "Trade File upload".