

## Raymond James Custodial (IAD) 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](mailto:ma_service_team@jeffnat.com) with the following verbiage:

*Please accept this email as my authorization to begin sending data feeds to Raymond James IAD for assets held at Jefferson National.*

*My Jefferson National Advisor/Firm ID: \_\_\_\_\_*

*My Brokerage Account Number(s) and Associated Jefferson National Account Number(s):  
[Brokerage account number] | [Jefferson National Account Number]*