

Shareholders Services Group (SSG) 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 Shareholders Services Group 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]