

## Tamarac Data Feed Request Process

### **Step 1: 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 Envestnet for assets held at Jefferson National. My Jefferson National Advisor/Firm ID number is \_\_\_\_\_.

### **Step 2: Confirmation**

Once the linking has been completed, the advisor will receive the following automated response from Jefferson National:

*Your request has been added to our Tamarac data feeds, you will need to request an auto-claim through your Advisor Services team by supplying your Jefferson National Advisor/Firm ID. Please let me know if you have any questions.*

### **Step 3: Tamarac Process**

Tamarac feeds are sent to Envestnet. Once Envestnet receives the Jefferson National Advisor/Firm ID from the Advisor/Firm, they will provide Advisor Services with that Advisor/Firm ID, and then Advisor Services will work with the Envestnet internal teams to use that Advisor/Firm ID and enable the feed on the Envestnet end. Then the Envestnet feed will populate in to the Tamarac platform. Once the Advisor Services contacts the internal teams with the Advisor/Firm ID, it should take approximately 48 hours to enable the feed.