Jefferson National

iRebal Process

Process

Step 1:

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

Step 2:

Place trades using the iRebal 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”.