

DATA FEED ACTIVATION

Setting up Jackson® for the Tamarac data feed is simple. A few steps are required to initiate the data transmission. To enable your feed, follow these steps.

Gather your Tamarac information:

Before you get started, make sure that you have your Firm ID. If you don't know your Firm ID, contact Service@investnet.com.

Turn on the Data Feed on Jackson.com:

1. Log on to jackson.com, and ensure that your contracts appear in your user profile.
2. On the top navigation, click **Contracts**, and then click **Integrations**.
3. Locate the Tamarac card.
4. Flip the toggle switch from **Inactive** to **Active**. This will launch the Terms of Agreement for you to accept or decline.
5. Click **I Agree** to accept the Terms of Agreement or **Disagree** to cancel the request. By clicking **I Agree**, you are acknowledging that you are authorized to request that your client data be sent to Tamarac.
6. Once the data feed is requested and the integration shows it's been activated, you should start receiving contract values within three to five business days.

TROUBLESHOOTING


If you have issues with the integration, please contact Service@investnet.com

1. Log on to **Jackson.com** and ensure that your contracts appear in your user profile.
2. On the top navigation bar, click **Contracts** and then **Integrations**.



3. Locate the Tamarac card.

Direct Integration




[Tamarac - Integration Instructions](#)

Firm ID Confirm Firm ID

Inactive ☐ Active

4. Enter your Tamarac Firm ID.

Direct Integration



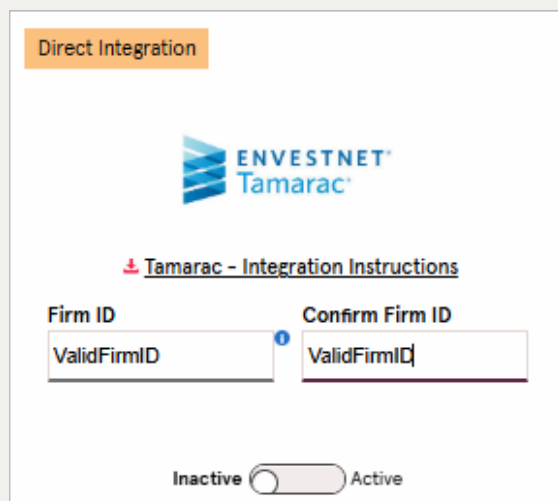
[Tamarac - Integration Instructions](#)

Firm ID Confirm Firm ID

Inactive ☐ Active

5. Confirm your Tamarac Firm ID by entering it again.

6. Flip the toggle switch from **Inactive** to **Active**. This will launch the Terms of Agreement for you to accept or decline.



Direct Integration

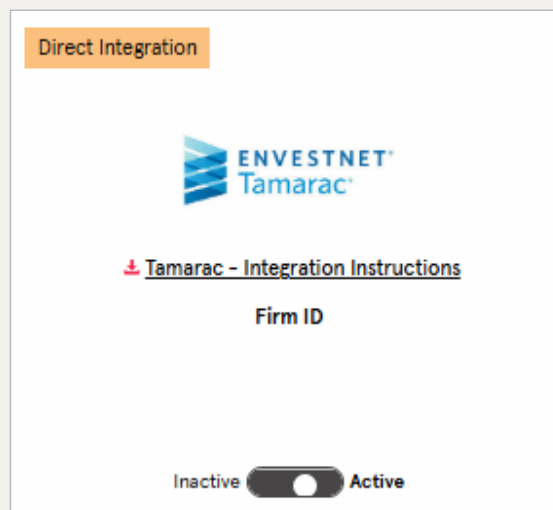
ENVESTNET[®]
Tamarac[®]

[Tamarac - Integration Instructions](#)

Firm ID
ValidFirmID

Confirm Firm ID
ValidFirmID

Inactive ☐ Active



Direct Integration

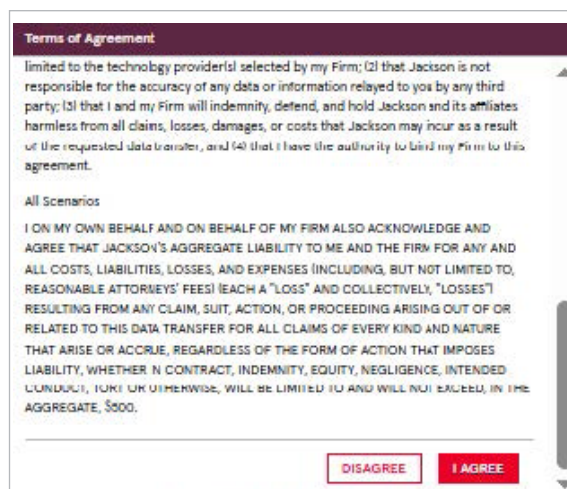
ENVESTNET[®]
Tamarac[®]

[Tamarac - Integration Instructions](#)

Firm ID

Inactive ☒ Active

7. Click **I Agree** to accept the Terms of Agreement or **Disagree** to cancel the request. By clicking **I Agree**, you are acknowledging that you are authorized to request that your client data be sent to Tamarac.



Terms of Agreement

limited to the technology provider(s) selected by my Firm; (2) that Jackson is not responsible for the accuracy of any data or information relayed to you by any third party; (3) that I and my Firm will indemnify, defend, and hold Jackson and its affiliates harmless from all claims, losses, damages, or costs that Jackson may incur as a result of the requested data transfer; and (4) that I have the authority to bind my Firm to this agreement.

All Scenarios

I ON MY OWN BEHALF AND ON BEHALF OF MY FIRM ALSO ACKNOWLEDGE AND AGREE THAT JACKSON'S AGGREGATE LIABILITY TO ME AND THE FIRM FOR ANY AND ALL COSTS, LIABILITIES, LOSSES, AND EXPENSES (INCLUDING, BUT NOT LIMITED TO, REASONABLE ATTORNEYS' FEES) EACH A "LOSS" AND COLLECTIVELY, "LOSSES" RESULTING FROM ANY CLAIM, SUIT, ACTION, OR PROCEEDING ARISING OUT OF OR RELATED TO THIS DATA TRANSFER FOR ALL CLAIMS OF EVERY KIND AND NATURE THAT ARISE OR ACCRUE, REGARDLESS OF THE FORM OF ACTION THAT IMPOSES LIABILITY, WHETHER IN CONTRACT, INDEMNITY, EQUITY, NEGLIGENCE, INTENDED CONDUCT, TORT OR OTHERWISE, WILL BE LIMITED TO AND WILL NOT EXCEED, IN THE AGGREGATE, \$500.

DISAGREE **I AGREE**

8. Once the data feed is requested and the integration shows it's been activated, you should start receiving contract values within three to five business days.

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