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@envestnet.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

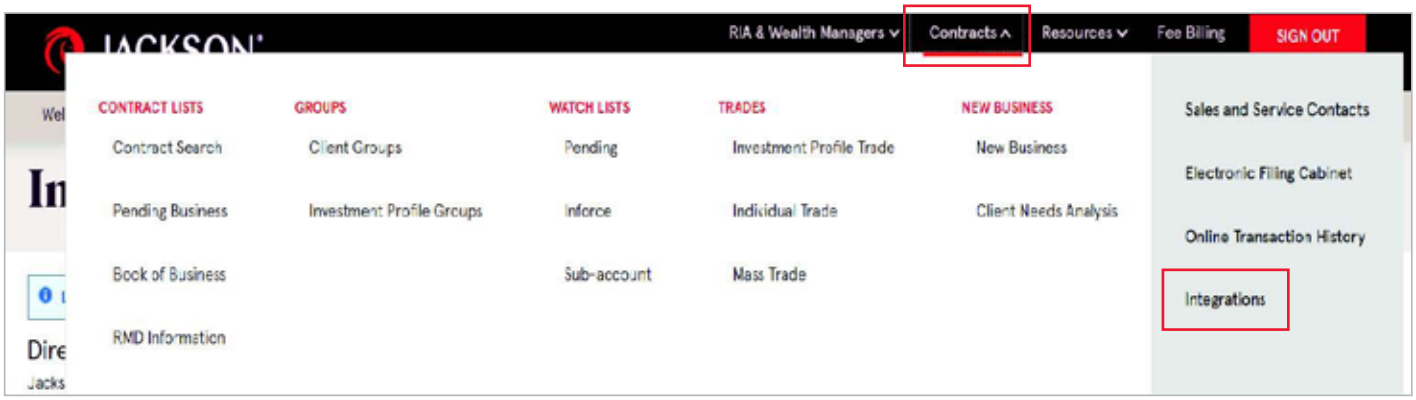
If you have issues with the integration, please contact Service@envestnet.com

Jackson® is the marketing name for Jackson Financial Inc., Jackson National Life Insurance Company®, and Jackson National Life Insurance Company of New York®.

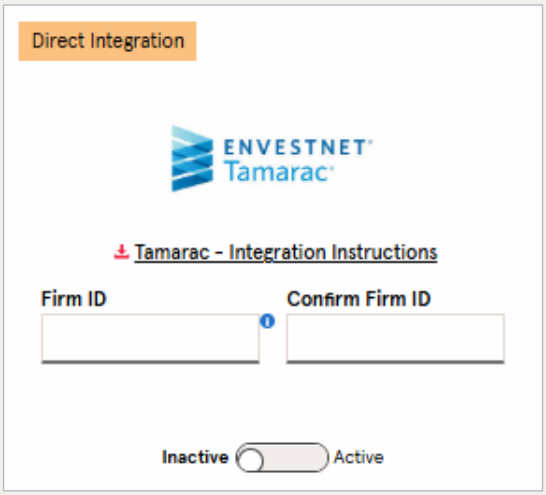
Not FDIC/NCUA insured • May lose value • Not bank/CU guaranteed • Not a deposit • Not insured by any federal agency

1. Log on to **Jackson.com** and ensure that your contracts appear in your user profile.

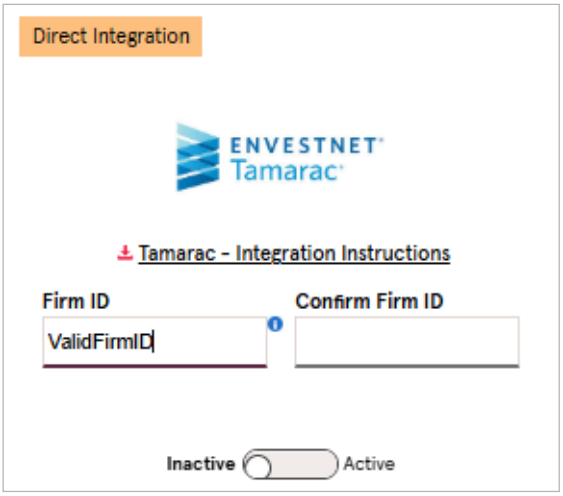
2. On the top navigation bar, click **Contracts** and then **Integrations.**



3. Locate the Tamarac card.

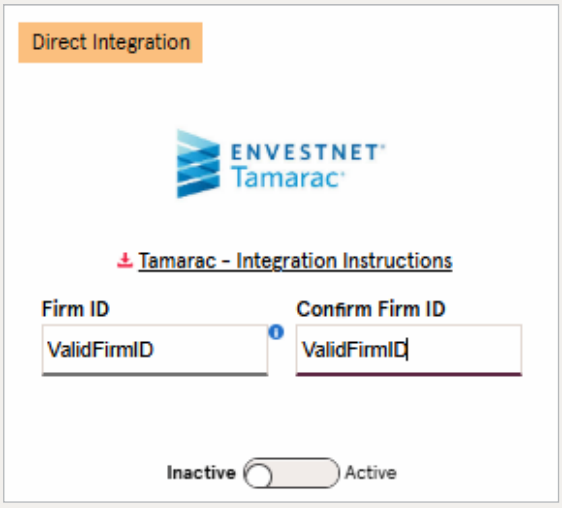


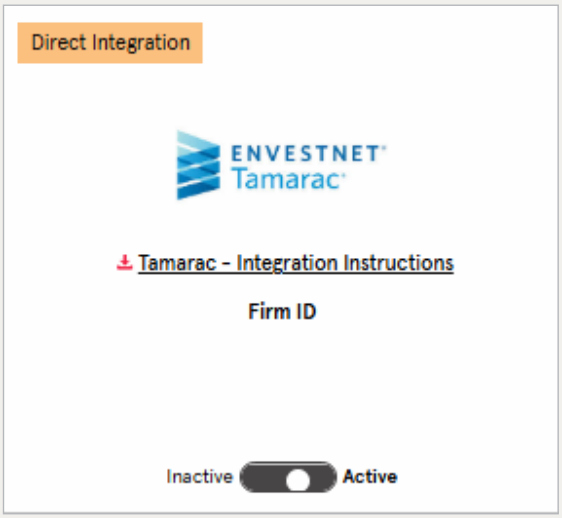
4. Enter your Tamarac Firm ID.



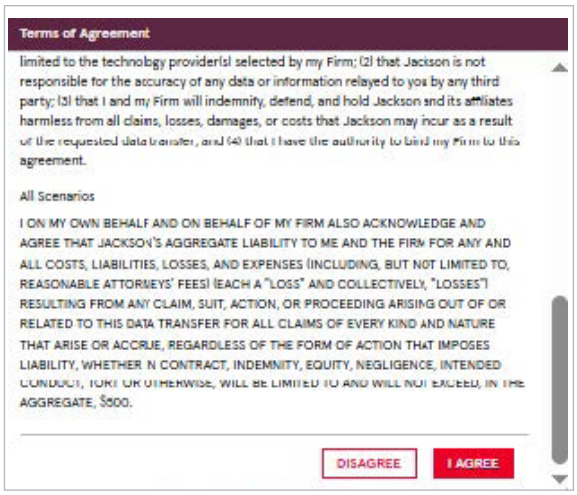
5. Confirm your Tamarac Firm ID by entering it again.

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





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.



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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