DST FAN Mail Enrollment Process

1. Go to www.dstfanmail.com, click on 'Enroll in FAN Mail' button



2. By clicking on 'Enroll in FAN Mail' button, it will bring you to the Terms & Conditions page, where user will read through and click on 'I Agree' at the bottom of the page.

C FAN Mail - Financial Advisor Network - Internet Explorer	브 그비스
🚱 🕤 💌 https://filetransfer.financi 🔎 🛫 🔒 DST Sy 🔄 🛛 FAN Mail - Financial Advisor 🛛 🗶	☆☆ 🕸
party, including without limitation, any agreement between DST and a Data Provider.	~
9. In using the accessed information, Recipient agrees to abide by all laws and regulations governing his or her industry or business, including without limit the requirement that Recipient not distribute the accessed information to prospective investors unless it is preceded or accompanied by current prospect the applicable Data Provider. Recipient agrees not to alter or modify in any way the accessed information or prints or copies of it. Actual or attempted unauthorized use of FAN Mail or IDC may result in criminal and/or civil prosecution. DST reserves the right, but has no duty, to view, monitor, and recor activity on the FAN Mail and IDC sites without notice or permission from Recipient. Any information obtained by monitoring, reviewing, or recording is su review by law enforcement organizations in connection with investigation or prosecution of possible illegal activity on such sites. DST will also comply wi court orders as well as all law enforcement and regulatory inquiries involving requests for such information. Recipient will make no deliberate attempt to any information that Recipient access and inform DST at 800-435-4112. DST or the affected Data Provider, may deny Recipient access FAN Mail and/or ID without prior notice whenever either DST or the affected Data Provider in their sole discretion deem it necessary.	tation tuses of ubject to th all o access ees to C
10. Recipient is prohibited from using any links to FAN Mail or IDC from any other web sites unless establishment of such a link is approved in advance by D writing. Recipient shall not frame any element of FAN Mail or IDC with any other web site or access FAN Mail or IDC through any device or service design provide high-speed, automated and/or repeated access to a site, unless such device or service is provided or approved in writing by DST.	ST in ned to
11. Recipient acknowledges that the use of FAN Mail and/or IDC is intended to be, and is, permissive on the part of DST and the Data Providers, and not ma DST and/or the affected Data Provider may require partial or full documentation before effecting any transaction whenever DST or the affected Data Pro their sole discretion, deem obtaining such documentation to be appropriate or desirable and shall not be liable for any loss due to a delay resulting from request.	ndatory. vider, in such
12. Recipient agrees to indemnify and hold harmless DST and the Data Providers, and their officers, employees and affiliates, from and against any and all if for losses, damages, costs, including legal fees, payment and expenses that may be occasioned by any cause whatsoever in connection with the transmi receipt, access and use of the information received by the Recipient or any other person who obtains access to the information by presenting the appropriand Password through FAN Mail and/or IDC (including, but not limited to, delays, inaccuracies, errors and omissions in the information).	iability ission, priate ID
I Agree I Disagree	
Disclaimer	
Copyright © 2016 DST Systems, Inc. All Rights Reserved.	~

- 3. Step 1: Service Level Selection
 - Select the appropriate level of access (Dealer, Branch, Representative)
 - o If enrolling with a different access level, please contact FAN Mail support.

EAN Mail - Financial Advisor Network - Internet Explorer		
🚱 🗢 🔽 https://filetransfer.financialt 🔎 🖬 DST Sys 🐓 🛛 FAN Mail - Fin	ancial Advisor ×	n 🛧 🛱
FAN Mail [®]		Contact Us 🔨
Financial Advisor Network		
Welcome to the FAN Mai	il Enrollment	
Step 1: Service Level Selection		
Step 2: Broker/Dealer Selection Select a service level.		
Step 3: Registration Information		
Step 4: ID/Password Reset Option Provides access to individual accounts for which you are the representative of record.		
Step 5: Mutual Fund Selection You may enroll for one or more representatives at this level.	Please choose a service level to see	
Step 6: Variable Annuity Selection	<<<<	
Step 7: Variable Universal Life Provides access to all accounts assigned to Selection		
Step 8: Alternative Investments Selection		
Step 9: Program Manager Selection O Dealer Level		
Step 10: Verification Provides access to all accounts assigned to your broker/dealer firm. Dealer level is		
appropriate for broker/dealer nome offices.		
 If you are a fee-based planner with no broker / dealer affiliation, please call 1-800]-	
435-4112, for enrollment instructions.		
	Lancei Next Step >	
	Disclaimer	
Соругі	ght © 2016 DST Systems, Inc. All Rights Reserved.	~

- 4. Step 2: Broker/Dealer Selection
 - Select your Broker/Dealer affiliation
 - Depending on your B/D, you may be required to complete a B/D Authorization Letter.

FAN Mail - Financial Advisor Network -	Internet Explorer	
🕞 😔 🗢 📄 https://filetransfer.financia	t 🔎 🝸 🔒 DST Sys 🐓 👘 FAN Mail - Financial Advisor 🛛 🗶	₼ ★ 🕸
FAN Mail®		Contact Us
Financial Advisor Network		
	Step 2: Broker/Dealer Selection	
Enrollment Steps		
Step 1: Service Level Selection	Select your broker/dealer.	
Step 2: Broker/Dealer Selection	Select the letter that your broker/dealer name begins with.	
Step 3: Registration Information	For numeric names, select "#".	
Step 4: ID/Password Reset Option	#ABCDEFGHIJKLMNOPORSIUVWXYZ	
Step 5: Mutual Fund Selection	Broker/Dealers: Advance Capital Services Inc.	
Step 6: Variable Annuity Selection	Advanced Advisor Group, LLC Advanced Equities, Inc.	
Step 7: Variable Universal Life Selection	Advantage Capital Corporation Adviser Dealer Services, Inc.	
Step 8: Alternative Investments Selection	Advisors Unlimited Advisory Group Equity Services	
Step 9: Program Manager Selection	ADP Broker-Dealer, Inc.	
Step 10: Verification	Can't find your broker/dealer?	
	Coursel (New One St	
	cancel Next Step >	
	Disclaimer	
	Copyright © 2016 DST Systems, Inc. All Rights Reserved.	

5. Step 3: Registration Information

\triangleright	Fill out profile details	, select a Software Vendo	r, and establish a password
------------------	--------------------------	---------------------------	-----------------------------

FAN Mail Financial Advisor Network - In	stemet Explorer	<u>تعامد م</u>
https://fietracufer.financialtra	ana.com/////////// 🖉 🚰 DST Systems Inc [🦘 🛛 FAN Mail - Financial Advisor 🛪	n 🔅 🗅
FAN Mail*		Contact Us 👝
Financial Advisor Network		
	Step 3: Registration Information	
Enrollment Steps		
Step 1: Service Level Selection	Enter the following registration information.	
Step 2: Broker/Dealer Selection	Primary Contact Information	
Step 3: Registration Information	First Name: M2: Last Name:	
Step 4: 10/Password Reset Option	pone je poe	
Skep 5: Minhoal Fored Selection	ABC Firm	
Step 4: Variable Annuity Selection	Address 123 Main Street	
Step 7: Variable Universal Universit		
Den St. Alamatica Incentrum's Scientian	City State/Province 7/P	
Silvey Tri Propram Hanager Selection	Phone Systematic Face (enternal)	
Step 10: Ventication	800 -435 -4112	
	small: johnedoe@home.com	
	Nother's Malden Name	
	(or other security keyword): mom	
	(used for security verification)	
	Customer Management Software Vendor	
	Morningstar Office	
	(maringson onice ED	
	Fababilah FAN Mail Dassavort	
	Your password:	
	Must be at least 7 to 12 characters in length	
	 Must contain at least one alpha character (A-Z) Must contain at least one numeric or special characteri (\$ # % 6.() - / ? = + 	
	Please note that the password is case sensitive.	
	FAN Mail Ressword	
	Parentar FAN Mail Password	
	••••••	
	Cancel Next Step >	
	5422 10000000000	
	Disclaimer	

6. Step 4: ID/Password Reset Option

> Choose and answer two personalized security questions

FAN Mail - Financial Advisor Network	k - Internet Explorer	i us x
🔆 🕑 🖝 🗌 https://liter.anufer_francisitrans.com/it///advisit/ // 🖉 💁 DST Systems Inc [] 😚 // FAI Mail - Francisi Advisor 🗙 🔛		n 👳 🛈
FAN Mail*		Contact Us
Enrollment Steps	Step 4: ID/Password Reset Option	
Step 1: Service Level Selection Step 2: Droker/Onaler Selection Step 3: Registration Information	Please choose and answer two personalized security questions. These will be used to validate your identity in the event that your ID and/or password become misplaced or disabled.	
Step 4: 1D/Password Reart Option Rep 5: Mutual Fund Selection Step 6: Variable Annuity Selection	Question #11 Answer Type Your Answer Here Question Select a question.	
Step 7: Variable Investal Life Selection Step 8: Alternative Investments Selection	Answer: Type Your Answer Here	
Step 9: Program Manager Selection Step 10: Vertication	Cancel Next Step >	

Disclaimer Copyright © 2016 DST Systems. Inc. All Rights Reserved.

7. Step 5: Mutual Fund Selection

- Select the Mutual Fund companies you wish to receive downloads for
- > You will need your Dealer #, Branch #, Rep #, and a sample client SSN

https://fietransfer.financialtrans.com/lf	Fallocal DT Systems Inc. [fg FAN Mail - Financial Advisor ×	
N Mail*		
Step	5: Mutual Fund Selection	
ment Steps Service Level Selecton To add want t Broker/Desler Selecton clickin	Mutual Funds, enter the criteria below and click "Add to List". If you do not receive data for this type of management company, you may proceed by the "Next Step" button below.	
Registration Information ID/Password Reset Option Mutual Fund Selection Variable Arrivity Selection Variable Universal Life	andr. Select 5 Mutual Fund. Branch ex. Math Res #1 Add to tat! Add to tat! Clear Fladds	
Selection Alternative Investments Selection Your	Mutual Fund Selections	
Verification No Mutual	Fund Rep Name Dealer # Branch # Rep # Client SSN al Funds to diplay.	
	Kuncel [Next Step >]	
	Disclaimer	

8. Step 6: Variable Annuity Selection

- Select the Variable Annuity companies you wish to receive downloads for
- > You will need the representative's SSN, Date of Birth, and a sample contract number

🕐 maga para na manasa ang kasa ang kasa ang kasa na	
AN Mail [®]	
Step 6: Variable Annuity Selection	
rollment Steps	
To add Variable Annuities, enter the criteria below and click "Add to List". If you do	
22 Broke/Dealer Selection not want to receive data for this type of management company, you may proceed by clicking the "Next Step" button below.	
p 3r. Registration Information	
g 41 10/Parsued Reset Octore Please select a Variable Annuity	
rp-Sr. Multual Fund Estantion Rep Date of Births (MH/DD/YYY): Client Contract + 1	
ep 61 Valekte Annuky	
ng 7: Virishis Usiyamal Life	
Selector	
p 🕏 : Altarnaliva Investments Belestien	
p 91. Prozram Manager Selecton Variable Annuity Selections Variable Annuity Selections	
p 10; Ventication //v Variable Annutries to display.	
Cancel Next Step >	

Disclaimer Copyright © 2016 DST Systems. Inc. All Rights Reserved.

- 9. Step 7: Variable Universal Life Selection
 - This step is dependent on whether the Software Vendor selected is compatible with VUL product data, so user may receive a warning prompt ahead of the company selection.

Notes and the second seco	
	Contact U
p 7: Variable Universal Life Selection	
uld you also like your Variable Universal Life (VUL) contracts?	
© Yes ONO	
this time your Software Vendor has not completed their programming: Interpret Variable Universal Life data files. By selecting "Yes" your	
uest for access will be logged and your Software Vendor will be	
med. If you do not want to receive data for this type of management npany, select "No" and then click on the "Next Step" button below.	
n May 23 08:21:18 CDT 2016 rningstar Office	
es Department 5-685-4494	
es@morningstar.com	
Heart Stop >	
	p 7: Variable Universal Life Selection wild you also like your Variable Universal Life (VUL) contracts?

Copyright © 2016 DST Systems. Inc. All Rights Reserved.

Step 7: Variable Universal Life Selection continued:

6.

- > Select the VUL companies you wish to receive downloads for
- > You will need the representative's SSN, Date of Birth, and a sample contract number

N Mail*		
The second s		
Advisor Network		
	The stability of the state of the state of the	
nent Steps	7: Variable Universal Life Selection	
Service Lovel Selection To add	d Variable Universal Life companies, enter the criteria below and click *Add to	
Droker/Dealer Selection may p	If you do not want to receive data for this type of management company, you vroceed by clicking the "Next Step" button below.	
Registration Information		
10/Password Reset Option Please	e select a Vanable Universal Life 🔽 John 🗉 Doe	
Mutual Fund Selection Rep SSI	8 Rep Date of Birth (MM/DD/YYYY): Client Contract #:	
Variable Annuity Selection		
Variable Universal Life Selection	Add to List Clinar Fields	
Nernative Investments Selection		
Program Manager Selection Your	Variable Universal Life Selections	
Variaboo Ne Variab	ie Universial Life Rep Name Rep 35N Rep Date of Birth Client Contract # able Universial Life companies to doplay.	
	Cancel Next Stap 3	

10 U(#) ×

Disclaimer Copyright © 2016 DST Systems. Inc. All Rights Reserved.

10. Step 8: Alternative Investments Selection

- > Select the Alternative Investment companies you wish to receive downloads for
- > You will need the Dealer #, Branch #, Rep #, and a sample client SSN

FAN Mail - Financial Advisor Network	k - Internet Explorer /	
https://fietracufer.frank	Laftrans.com/H/#ADRAM 🖉 💁 💁 DSY Systems Inc [😚 🛛 FAX Mail - Feancial Advisor 🛪 📃	n * 6
FAN Mail*		Contact Us
Financial Advisor Network		
	Step 8: Alternative Investments Selection	
Enrollment Steps		
Step 1: Service Level Selection	To add Alternative Investments companies, enter the criteria below and click "Add to	
Step 2: Broker/Dealer Selection	List, if you do not want to receive data for this type of management company, you may proceed by clicking the "Next Step" button below.	
Step 3: Residuation Information		
Step 4: 10/Passeerd Reset Option	Priese select a Alternative Investments.	
Step Sr. Mutual Fund Selection	Dealer #1 Branch #1 Reg #1 One Clarit's S511	
Step 6: Variable Annuity Selection	Add to Link Char Fielde	
Step 7: Variable Universal Life Selection		
Step 8: Alternative Investments Selection	Your Alternative Investments Selections	
Step 9: Program Manager Selection	Alternative Investments Rep Name Dealer # Branch # Rep # Client SSN	
Step 10: Verification	No Alternative Investments to display.	
	Facult Nace Stern T	
	(many others)	
	Disclaimer	
	Capyright @ 2016 DST Systems, Inc. All Rights Reserved.	

- 11. Step 9: Program Manager Selection
 - > Select the Program Manager companies you wish to receive downloads for
 - > You will need the Dealer #, Branch #, Rep #, and a sample client SSN

0 tr 6
Contact Us

Copyright © 2016 DST Systems, Inc. All Rights Reserved,

12. Step 10: Verification

\triangleright	Confirm all information was entered correctly and submit the enrollment
and Reason	

Contraction and a second second second second	Con port in Dot systems and the Period Advect in the	
etwark		
Step 10	· Verification	
ens Step 10	. vernearon	
Verify you	r account information below. Click "Submit Enrollment" when	
your inform	mation is correct.	
Broker/I	lealer	
Dealer Ad	Vanced Advisor Group, LLC	
d Salaran	No.6fy	
a service of		
Basician	lan -	
evenal Life Primary Con	don Masti John F. Doe	
Mother's Ma	aiden Name: mom	
and the second se	ABC Street	
Address:	123 Main Street	
Cite	Kanada Chu	
State:	Nissouri	
Zip:	64105	
Dhanas	(800)425-4112	
Fax	1000733-712	
C-mail:	johnedoe@home.com	
Software Ve	endor: Morningstar Office	
	hodify	
Your Hul	ual Fund Selections	
Hutual Fond	d Rep Name Dealer # Branch # Rep # Client SSN	
Aberdeen	-Asset John E 1 123 123-45-6789	
Managem	ent Doe	
	Madify	
Your ID	Deseward Deat Ontions	
D/Research	Reset online is consulty action - online many and status is analysis.	
What is you	e main frequent fluer number?	
vision		
What was y	our kindergarten teacher's last name?	
vision		
	Hodify	