

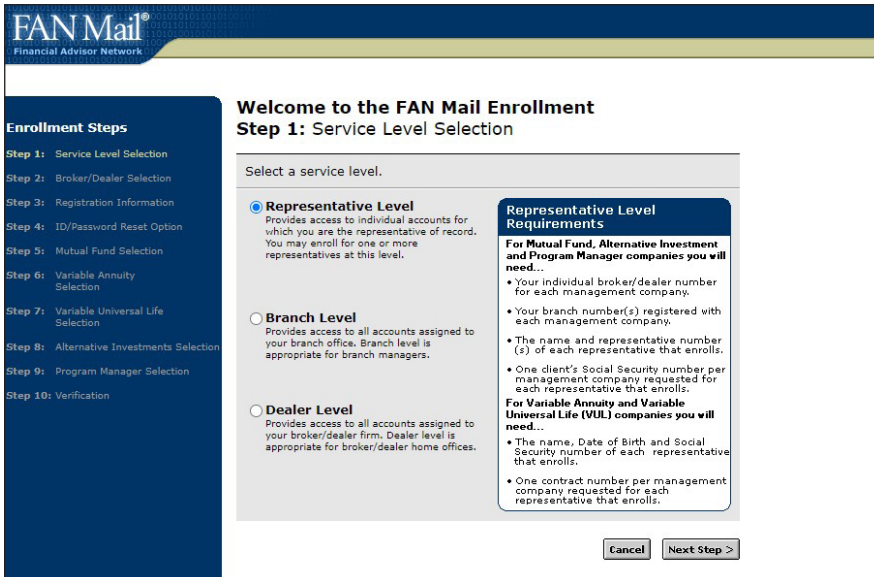
Support at every step

How-to guide on setting up your DST FAN Mail®

Follow these steps carefully to enroll in FAN Mail.

New users:

1. On the **'Service Level'** page, choose the **'Representative Level'** and click **'Next Step'** to move on.



FAN Mail
Financial Advisor Network

Enrollment Steps

- Step 1: Service Level Selection
- Step 2: Broker/Dealer Selection
- Step 3: Registration Information
- Step 4: ID/Password Reset Option
- Step 5: Mutual Fund Selection
- Step 6: Variable Annuity Selection
- Step 7: Variable Universal Life Selection
- Step 8: Alternative Investments Selection
- Step 9: Program Manager Selection
- Step 10: Verification

Welcome to the FAN Mail Enrollment

Step 1: Service Level Selection

Select a service level.

- Representative Level**
Provides access to individual accounts for which you are the representative of record. You may enroll for one or more representatives at this level.
- Branch Level**
Provides access to all accounts assigned to your branch office. Branch level is appropriate for branch managers.
- Dealer Level**
Provides access to all accounts assigned to your broker/dealer firm. Dealer level is appropriate for broker/dealer home offices.

Representative Level Requirements

For Mutual Fund, Alternative Investment and Program Manager companies you will need...

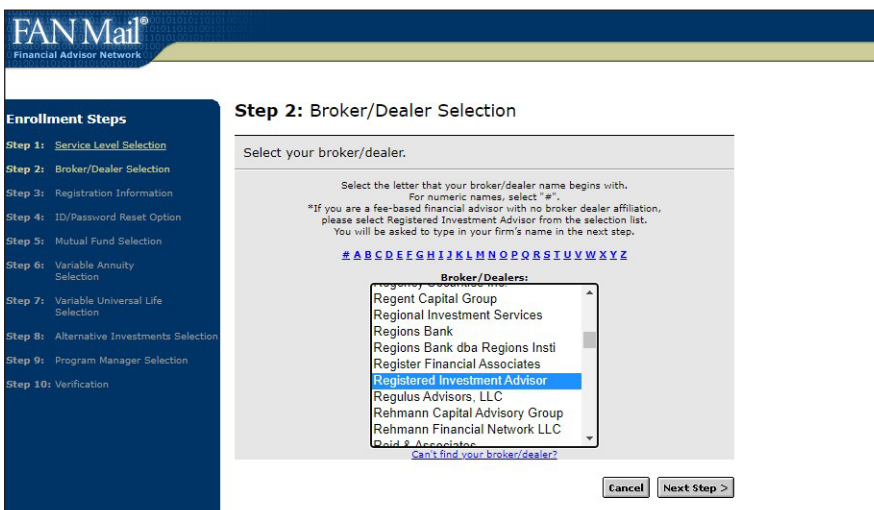
- Your individual broker/dealer number for each management company.
- Your branch number(s) registered with each management company.
- The name and representative number (s) of each representative that enrolls.
- One client's Social Security number per management company requested for each representative that enrolls.

For Variable Annuity and Variable Universal Life (VUL) companies you will need...

- The name, Date of Birth and Social Security number of each representative that enrolls.
- One contract number per management company requested for each representative that enrolls.

[Cancel](#) [Next Step >](#)

2. On the **'Broker/Dealer Selection'** page, select **'Registered Investment Advisor'** from the list, and then move to the next step.



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Step 2: Broker/Dealer Selection

Select your broker/dealer.

Select the letter that your broker/dealer name begins with.
For numeric names, select "#".
*If you are a fee-based financial advisor with no broker dealer affiliation, please select Registered Investment Advisor from the selection list.
You will be asked to type in your firm's name in the next step.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Broker/Dealers:

- Regent Capital Group
- Regional Investment Services
- Regions Bank
- Regions Bank dba Regions Insti
- Register Financial Associates
- Registered Investment Advisor**
- Regulus Advisors, LLC
- Rehmann Capital Advisory Group
- Rehmann Financial Network LLC
- David R. Associates

[Can't find your broker/dealer?](#)

[Cancel](#) [Next Step >](#)

3. On the 'Registration Information' page, complete the advisor information and create a FAN Mail password. Then click 'Next Step' until you get to the 'Variable Annuity Selection' screen (step 6).

Enrollment Steps

- Step 1: [Service Level Selection](#)
- Step 2: [Broker/Dealer Selection](#)
- Step 3: **Registration Information**
- Step 4: [ID/Password Reset Option](#)
- Step 5: [Mutual Fund Selection](#)
- Step 6: [Variable Annuity Selection](#)
- Step 7: [Variable Universal Life Selection](#)
- Step 8: [Alternative Investments Selection](#)
- Step 9: [Program Manager Selection](#)
- Step 10: [Verification](#)

Step 3: Registration Information

Enter the following registration information.

Primary Contact Information

First Name: DST MI: Last Name: FAN Mail

Firm/Company Name: (optional)

Address: 210 W 10th St

City: Kansas City State/Province: Missouri Zip: 64105

Phone: 816 - 435 - 1000 Ext: (optional) Fax: (optional)

E-mail: fanmail@dstsystems.com

Mother's Maiden Name (or other security keyword): DST (used for security verification)

Customer Management Software Vendor

Not sure which software to select? Call 1-800-435-4112.

OTHER

Establish FAN Mail Password

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 character: @ # % & () - / ? _ = +

Please note that the password is case sensitive.

FAN Mail Password: *****

Re-enter FAN Mail Password: *****

Cancel Next Step >

4. On the 'Variable Annuity Selection' screen, select Midland National, fill out the applicable information, and then click 'Add to list'. Then click 'Next Step'.

Enrollment Steps

- Step 1: [Service Level Selection](#)
- Step 2: [Broker/Dealer Selection](#)
- Step 3: [Registration Information](#)
- Step 4: [ID/Password Reset Option](#)
- Step 5: [Mutual Fund Selection](#)
- Step 6: **Variable Annuity Selection**
- Step 7: [Variable Universal Life Selection](#)
- Step 8: [Alternative Investments Selection](#)
- Step 9: [Program Manager Selection](#)
- Step 10: [Verification](#)

Step 6: Variable Annuity Selection

To add Variable Annuities, enter the criteria below and click "Add to 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.

Variable Annuity: Please select a Variable Annuity... Rep First Name: DST MI: Last Name: FAN Mail

Rep SSN: 123 - 45 - 6789 Rep Date of Birth (MM/DD/YYYY): 01/01/1989 Client Contract #: *****

Add to List Clear Fields

Your Variable Annuity Selections

Variable Annuity	Rep Name	Rep SSN	Rep Date of Birth	Client Contract #
Midland National Life	DST FAN Mail	*****	01/01/1989	123456789

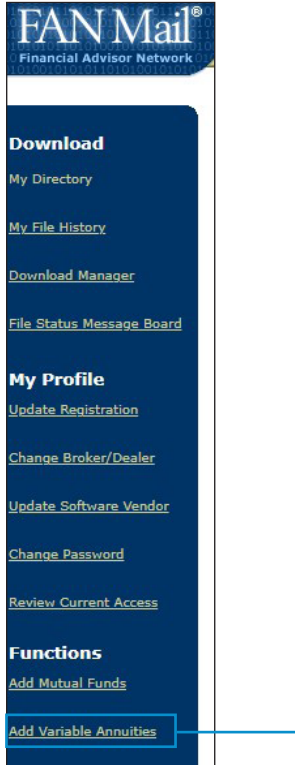
Modify

Cancel Next Step >

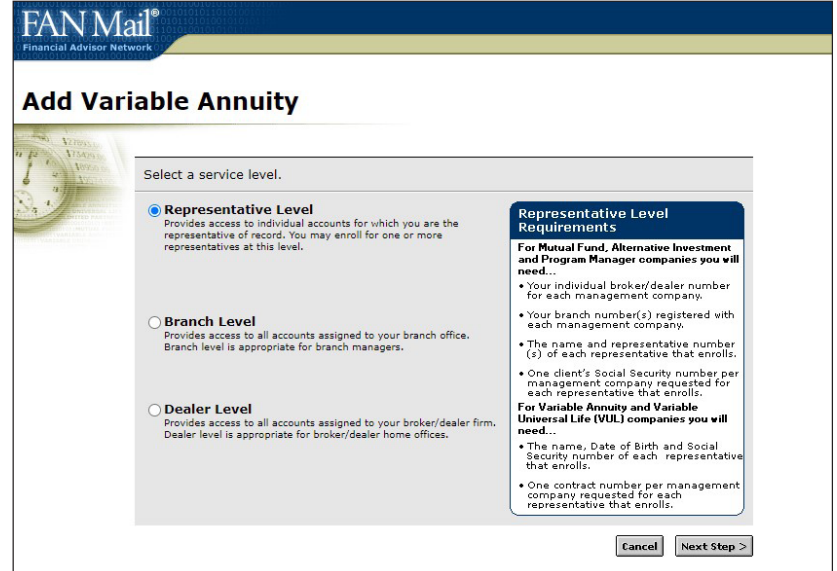
5. Continue on through the next few screens, until you reach the 'Verification' page. Then submit your set up request.

Existing users:

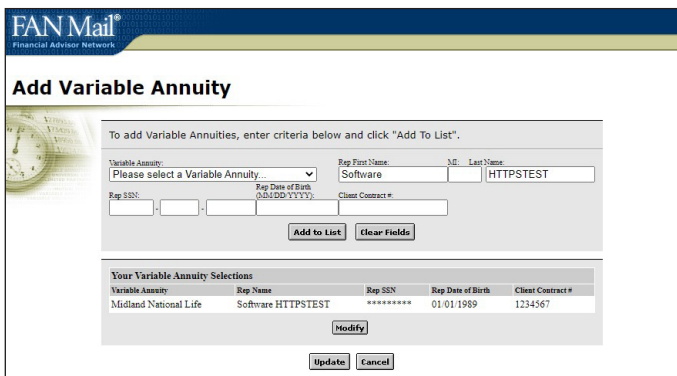
1. Within DST FAN Mail, select **“Add Variable Annuity”** (found under the **‘Functions’** section) from Midland National.



2. On the ‘Service Level’ page, choose the **‘Representative Level’** and click **‘Next Step’** to move on.



3. Fill out applicable information click **‘Add to list’**, then click **‘Update.’**



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