



How to setup DST Fanmail

DST Fanmail is a free service offered to Registered Representatives to get automated downloads of customer account data from more than 150 mutual fund, variable annuity, REIT and variable universal life companies (limited on VUL).

We can take a download from DST Fanmail to automatically update your client's mutual funds, variable annuities, REITs and to a limited extent Variable Universal Life in the system. You will be able to view your client's data with the Consolidated Financial Review (CFR) Reports in the system.

To take advantage of updating these values you must setup a DST Fanmail ID and Password. The following instructions will show you the process for setup. (You may already have a DST Vision account but this cannot be used to update the system).

Step 1) Log onto www.dstfanmail.com

Step 2) Click on "Enroll in Fan Mail"

Step 3) The DST system does a good job in taking you through 9 Step Process to setup your logon.

There is some information you need to have for the registration. For Mutual Fund, REIT, and DPP companies you will need:

- a.) Your individual broker/dealer number for each management company (You can get from your Broker/Dealer)
- b.) Your branch number registered with each Management Company (You can get from your Broker/Dealer)
- c.) The name and representative number of each representative that enrolls. (This would only be you).
- d.) One client's Social Security number per Management Company requested for each representative that enrolls. (Because this is a free service the various companies need proof you do business with them, thus the client SSN requirement. You only need to do this for one client to prove you do business with them and then all your clients data would come down from that provider)

For Variable Annuity and Variable Universal Life companies you will need:

- a.) The name and Social Security number of each representative that enrolls. (Your information)
- b.) One contract number per Management Company requested for each representative enrolled.

Step 4) Once you have your DST Fanmail ID & Password, contact us at (239) 325-1225 with the information for us to set it up in the system. This is giving us the authority to pull those values for you. Due to the Management Companies, the process can take 2-4 weeks for all the information to move into the system from DST Fanmail once we received the password to have the link set up.