

## Monument Advisor - Annuity Linking Request

**Instructions:**

**Use this form to link Monument Advisor policy information to Folio Institutional for annuity reporting.**

*Annuity Reporting at Folio Institutional includes both policy level and sub-account level detail. Policy value will be displayed on the Folio Advisor Platform as "Assets Held Away". Policies are generally linked within 2-3 business days.*

For both new and existing policies, please complete the form in its entirety and submit the form to Jefferson National either by email ([ma\\_service\\_team@jeffnat.com](mailto:ma_service_team@jeffnat.com)) or fax (866-667-0563). Please note both the Annuity Policy Number and the 10-digit Folio Institutional Brokerage Account Number must be submitted for linking to occur.

**New Policy without Policy Number:** If you are submitting this form for a new policy that has not yet been assigned a policy number, complete the entire form but leave the Annuity Policy Number \*if issued\* field blank. When Jefferson National receives the Monument Advisor Application and this form, they will assign a policy number and fill in the blank field for you.

Jefferson National will notify Folio Institutional of this linking request. The form does not have to be submitted to Folio Institutional.

**Requestor Information:**

<b>Correspondent Firm Name:</b>	
<b>Requestor Name:</b>	
<b>Jefferson National Advisor Number:</b>	
<b>Requestor Phone Number:</b>	
<b>Requestor Email:</b>	

**Policy Information:**

<b>Annuity Policy Number *if issued*:</b>	
<b>Annuity Owner Name:</b>	

**Folio Information:**

<b>Folio Institutional Brokerage Account Number: (10 digit Alpha-Numeric)</b>	
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**Submit Form To Jefferson National:**



Email form to: [ma\\_service\\_team@jeffnat.com](mailto:ma_service_team@jeffnat.com)



Fax Form to: 866-667-0563