

Black Diamond Data Feed Request Process

Linking:

Ask the advisor if they are currently using any feeds through ACD (Advent Custodial Data).

- a. If no, direct the advisor to reach out to his/her Client Advocate at Black Diamond for an ACD addendum that will need to be signed before initiating the feed.
- b. If yes, the form is complete and the advisor is ready to move forward.

The Advisor will need to initiate the Jefferson National Feed from the “Add ACD Accounts” link on the Black Diamond setup tab.



Select Jefferson National from the dropdown of available interfaces.



Select discretionary status of the accounts and complete either the direction letter or authorization letter. The form type will depend on the discretionary status.



Upload signed paperwork into Black Diamond via the ACD page and the initiation process begins.

Important item to note:

Black Diamond advisors do not get direction letters from Connection. Everything related to ACD should be managed via the Black Diamond platform. If advisors have any questions about this, direct them to reach out to their Black Diamond Client Advocate.