Fidelity/Black Diamond
Setup Instructions

MIDLAND ADVISORY
Issued by Midland National® Life Insurance Company

1 Establish a stand alone account to house the assets allocated to the Midland Constance CDA

2 Establish a new G# to house all Midland CDA Covered Asset accounts

- Work directly with your Fidelity representative to establish the new FA Master account
- **Ensure the account only encompasses the Covered Asset account(s) established**
- Note the new G# Account Number

3 Request a Third-Party Transmission via Integration Xchange

- In order to make a third party transmission request, the user must have the following entitlements:
  - **"Integration Xchange_OutboundTransmissionsRulesManagement" entitlement**
  - **"Integration Xchange Admin Outbound Transmission Rules Management" entitlement**
- In Integration Xchange, select **My Firm's Integrations > Outbound Transmission Rules**
- Select **Add Rule**
- The applicable transition rule is **G Numbers = Custody (168)**
- Select "Black Diamond" from the **Entity Name** dropdown
- If required, enter "BD00003709" in the **Header** field. This is only necessary for CGF/FILI/FPRS affiliate data.
- Select **Next** to select data masking criteria. Midland only requires First Name, Middle Name and Last Name. Select **Next** to review the transmission rule details.
- Enter your full name and select **Confirm**.
- Changes submitted online via the Integration Xchange will be effective the same day provided they are entered prior to 7:30PM EST.

4 Advise Midland National via email that the setup has been completed.

Send an e-mail **riaservice@sfgmembers.com** with "Constance Fidelity Custodial Connection" in the subject and the Firm Name, G# and Certificate Owner in the body of the email.

5 Midland will request access to the account data and as soon as it is confirmed, the CDA contract will be issued.