

## Jackson National — New Business Checklist

**In order to do business with Lorence and Vander Zwart and Jackson National:**

1. LVZ must have on file a signed Solicitors Agreement.

*In addition to the form listed below, your broker dealer may have additional requirements such as requiring account information forms, third party disclosure documents or other requirements.*

**The following forms need to be completed and returned directly to LVZ to add third party management.**

LVZ Investment Management Agreement Form

LVZ Investor Suitability Questionnaire

LVZ Solicitors Disclosure Brochure

Jackson National RIA Authorization Form



**Did you know:**

LVZ can fill out your paperwork for you with your client's consent?

The above forms are available on Laser App and our website?

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