1) **Overall Scope of the Enhancement (should include the Business Reason for the change):**

Edward Jones is recommending hourly LNA feeds instead of only four cycles each business day.

Edward Jones currently receives product specific training data from a preferred education/training provider four times daily via the LNA file. Financial advisors must call our service line when training is completed between DTCC cycles. The insurance/annuity
service rep must contact the CE area who then confirms completion via administrative access on the provider’s portal before manually adding the completing information to our database. This is four unnecessary touch points in order to add the completion information into our database making it possible to place an annuity trade. Typically financial advisors complete the required training in preparation for a client appointment and assume an annuity trade can be place soon after completing the training course. Receiving the data every three or so hours causes delays and unnecessary touch points. Increasing output cycles will allow us to provide the level of service our financial advisors expect and deserve.

2) **Recommended Record Layout Changes:**
   Hourly LNA feeds are recommended with no layout changes.

3) **Business Scenario – (Used to determine Best Practices)**

4) **Standard Usage – (Should include specific field/code usage)**
   Standard usage would not change by adding additional LNA cycles.

5) **Status Update:**
   The group decided it would advantageous to add additional LNA cycles to the current 4 cycles that run Monday through Saturday at 7am, 10am, 1pm and 4pm. DTCC did initial analysis and a concern arose regarding the impact to the Producer Management Portal. Further analysis is being conducted by DTCC to determine the feasibility of adding cycles. Many on the call felt a late day cycle should be added at around 6 pm or 7 pm.

   **Status:** TBD

**Revision History**

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<th>Version</th>
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<td>Jon Volpe</td>
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