Electronic delivery of statements & confirmations for financial professionals

What we're doing

Effective September 1, 2020, Lincoln will no longer print and mail hard copies of life insurance annual and quarterly statements, or VUL confirmations, to financial professionals. For easier, faster access, all materials are available electronically at LincolnFinancial.com.

Why we're doing it

As we all adjust to the far-reaching impacts of COVID-19, Lincoln is taking steps to ensure our customers and financial professionals can continue accessing the information they need, without interruption. One immediate step we are taking to maintain business continuity is to move client quarterly and annual statements, and VUL confirmations, exclusively online. (Please note: documents will still be printed and mailed to policyowners.)

In the past, Lincoln printed and mailed this correspondence to financial professionals and their offices. However, due to increased work from home situations and safety precautions for both you and our staff, this move to electronic delivery is a natural step to ensure you continue to have access to the information you need. It's easy to access on LincolnFinancial.com, and below are instructions on how to get you and your office started.

There are many benefits of electronic correspondence, such as:

- **Speed:** Access correspondence anytime online, 24/7. Now you won't have to wait for mailed copies.
- **Convenience:** Historical correspondence is available from 2010 to today. That is ten years of information, all in one easy-to-access location!
- **Security:** Protect your customers' information and reduce your burden for handling and appropriately destroying confidential customer information.

How it affects you

If you are already registered on our website, no action is required.

If you have not yet registered, please do so to ensure you are able to view future statements and VUL confirmations.

Frequently asked questions

Q1. How do I register on LincolnFinancial.com? A1. To register, follow the steps below: 1. Go to LincolnFinancial.com and click on **LOG IN/REGISTER** in the upper right-hand corner 2. From the registration page, select **Industry Professionals** 3. Select **I Sell Lincoln Products** 4. Enter personal ID information and Lincoln-specific contact information
Q2. How do I view current and past life client correspondence (confirmations and statements) on the website? A2. To view client correspondence and statements, log onto LincolnFinancial.com using your existing user ID and password and following the step shown in the screen shots below.
Q3. **How often are statements and confirmations made available?** A3. Statements and confirmations are available as follows: • Annual statements are available within 1-3 business days of the policy anniversary • Quarterly Statements are available within 5-7 business days from the end of the quarter • VUL confirmations are available within 1-3 business days following the completion of the transaction
Q4. What is the timeframe that client correspondence and statements are available? A4. Client correspondence and statements are available from 2010 to today.
Q5. If my financial professionals have questions or need assistance registering online, who can they call? A5. You can call LFD Support: 877-533-1022 o Hours: Monday through Friday 8:00 a.m. – 7:00 p.m. Eastern
Q6. When will this change be effective? A6. We will stop printing copies of statements and confirms for financial professionals in September 2020.
Q7: Are there any correspondence excluded from electronic delivery?

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A7: Yes, Lincoln will continue to print and mail the following correspondence: Maturity Segment Letters, Beneficiary and/or Owner change letters, Grace Lapse letters and Transaction Letters.

Q8: Why am I receiving this email again?

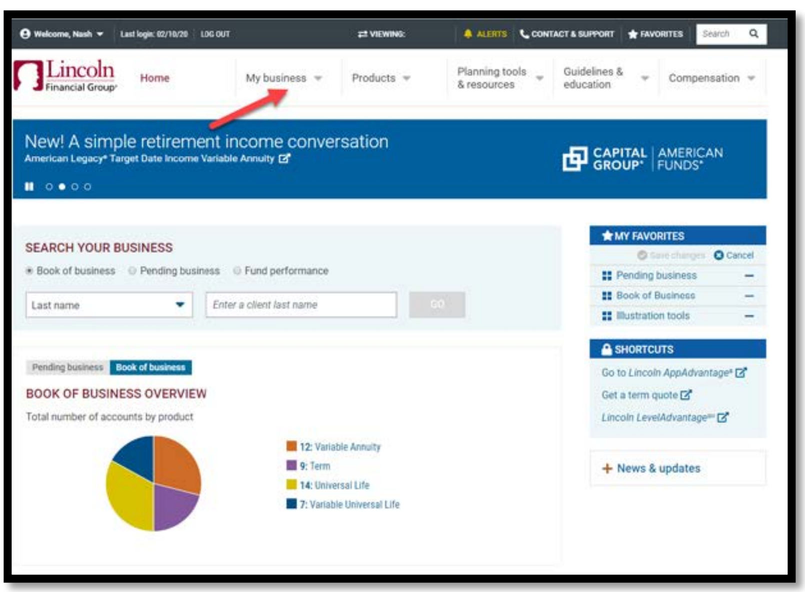
A8: The reason for receipt of this notification is due to an active policy inforce with a firm that was still receiving paper statements and confirmations. As of Sept 1st, 2020, this firm has been turned off so you can access this information online now.

Note: Policies administered by our Lincoln, NE, office will continue to provide print copies of correspondence to financial professionals.

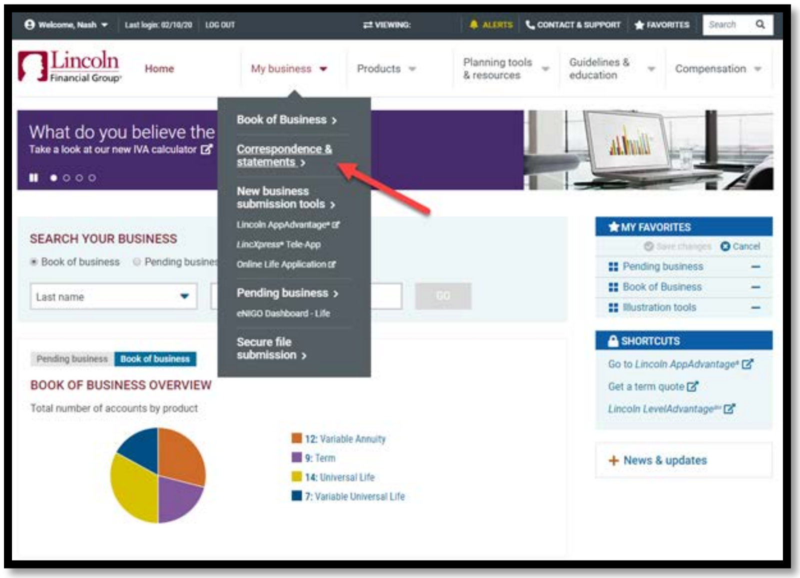
Screenshots

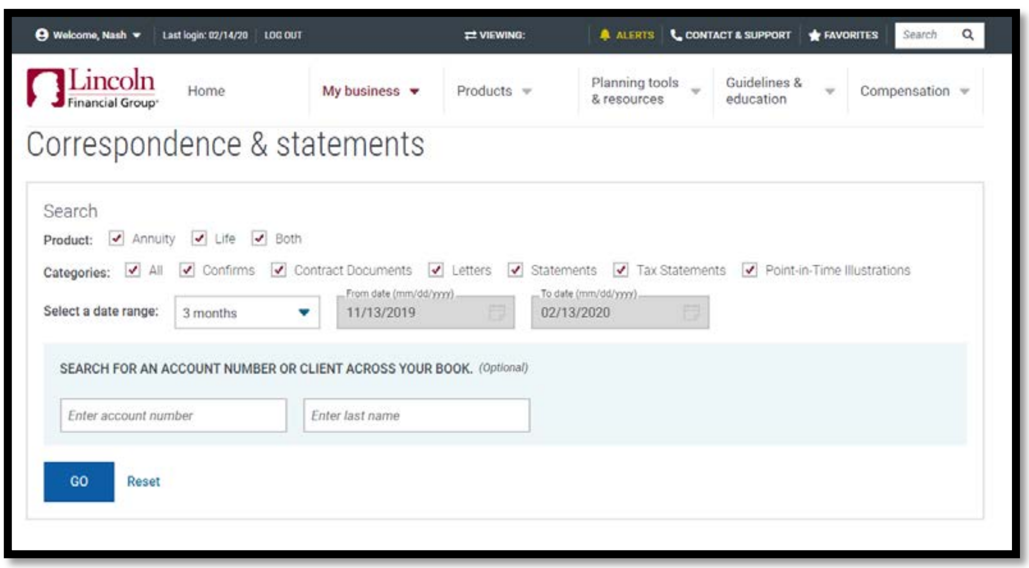
Summary page for financial professional upon logging in.

- Under “My business” select “Correspondence & statements” to bring up all of the correspondence that is available for your policies.
- You can filter your selection further using the criteria in the search box, as well as, sort by column. Otherwise, correspondence will show for all policies/contracts in chronological order.



- You can click on the correspondence, create bundles to download, and create a report from the table.





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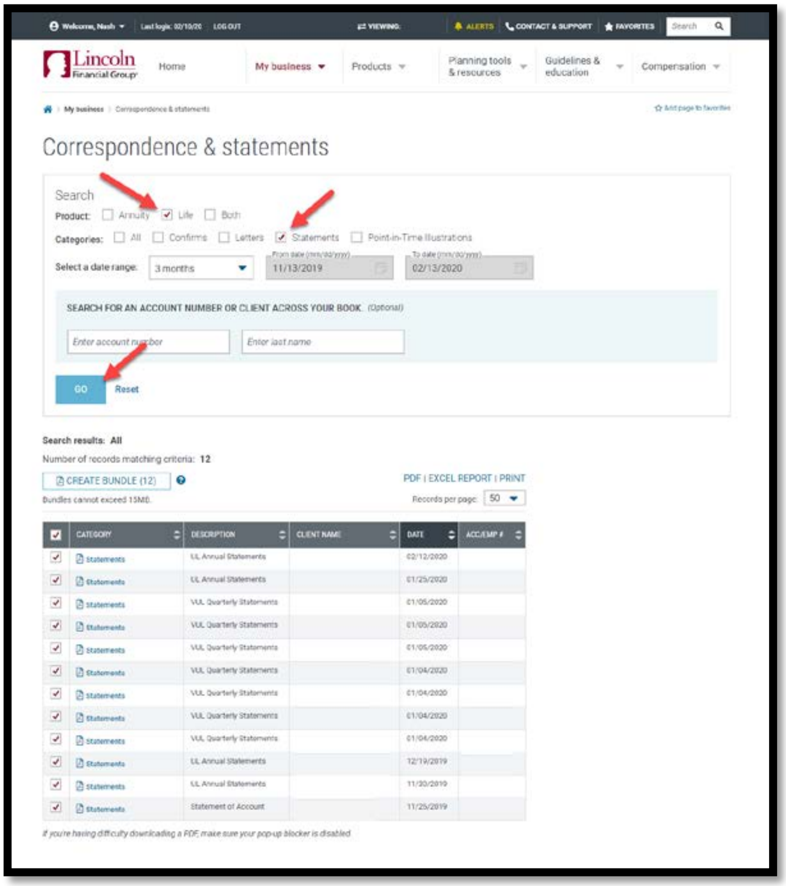
Home
My business
Products
Planning tools & resources
Guidelines & education
Compensation
Correspondence & statements
Search
Product:
Annuity
Life
Both
Categories:
All
Confirms
Letters
Statements
Point-in-Time Illustrations
Select a date range:
3 months
11/13/2019
02/13/2020
SEARCH FOR AN ACCOUNT NUMBER OR CLIENT ACROSS YOUR BOOK (Optional)
Enter account number
Enter last name
GO
Reset
Search results: All
Number of records matching criteria: 12
CREATE BUNDLE (12)
Bundles cannot exceed 15MB.
PDF | EXCEL REPORT | PRINT
Records per page: 50
CATEGORY
DESCRIPTION
CLIENT NAME
DATE