New online options for financial professionals to manage their email notifications

Receive alerts and notifications when important account documents are posted online

What we're doing

Effective October 12, 2020, Lincoln will offer our financial professionals the ability to receive email notifications when electronic copies of life insurance annual and quarterly statements, or VUL confirmations, are available to view at LincolnFinancial.com.

Why we're doing it

Convenience. We know our financial professionals are busier than ever, so adding this functionality will allow them to access the information they need, whenever and wherever they want. Within the site, financial professionals can customize when they receive information, and what updates will generate an alert to let them know correspondence is available to view on LincolnFinancial.com. It's easy to access 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, here's how to manage your alerts in **Communications preferences** on LincolnFinancial.com.

If you have not yet registered, follow the simple steps below so you are able to view future statements and VUL confirmations.

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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

Web Registration Flier link

Q2. How do I view life client correspondence (confirmations and statements) on the website?

A2. To view current and past 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 need assistance registering online, who can they call?

A5. You can call LFD Support: 877-533-1022. They're available Monday through Friday from 8:00 a.m. to 7:00 p.m. Eastern.

Q6. When will this change be effective?

A6. Financial professionals are now able to manage their electronic notifications starting on October 12, 2020.

Q7: Are there any correspondence excluded from electronic delivery?

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.

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Q8: Will the communications preferences page be the same for financial professionals for a life insurance policy and an annuity contract? A8: No, the financial professional will have a different experience depending on business line, as the communication preferences pages are laid out differently. Lincoln will continue to review and update the pages to provide a more consistent customer experience.
Q9: Once I set my preference, when will I receive my email notification? A9: Email notifications will be sent on Tuesdays, in accordance with your notification frequency.
Q10: Why did I receive a paper statement even though I set my preferences to get an email notification to view it online? A10: You may have active life insurance policies that were unable to go paperless. Lincoln is reviewing the opportunity to improve the customer experience and provide consistency across all policy types.

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.

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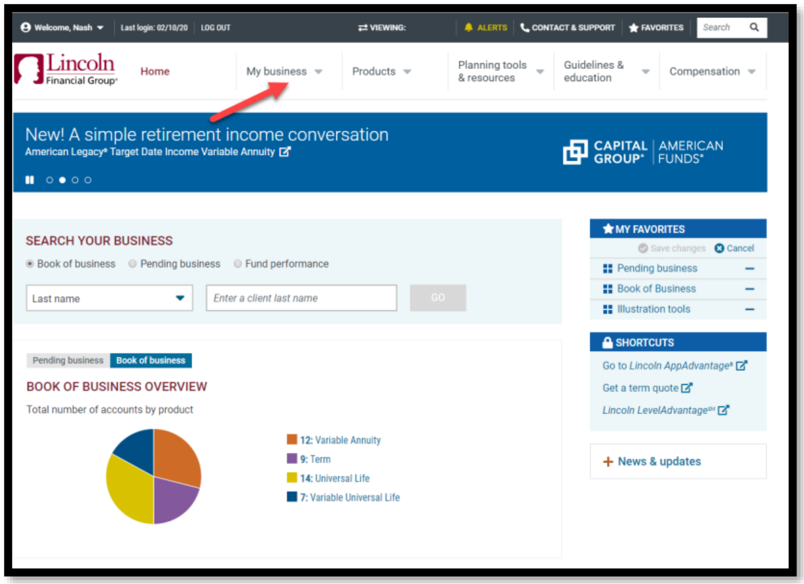
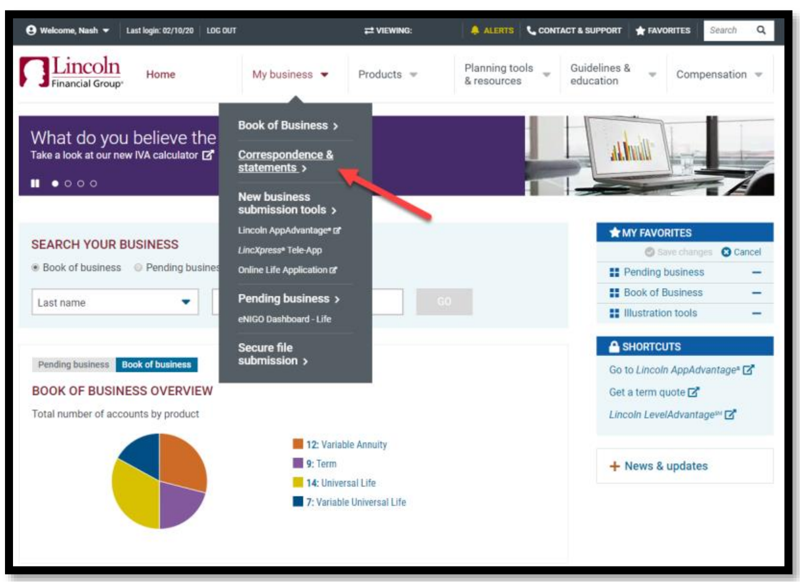


- You can click on the correspondence, create bundles to download, and create a report from the table.



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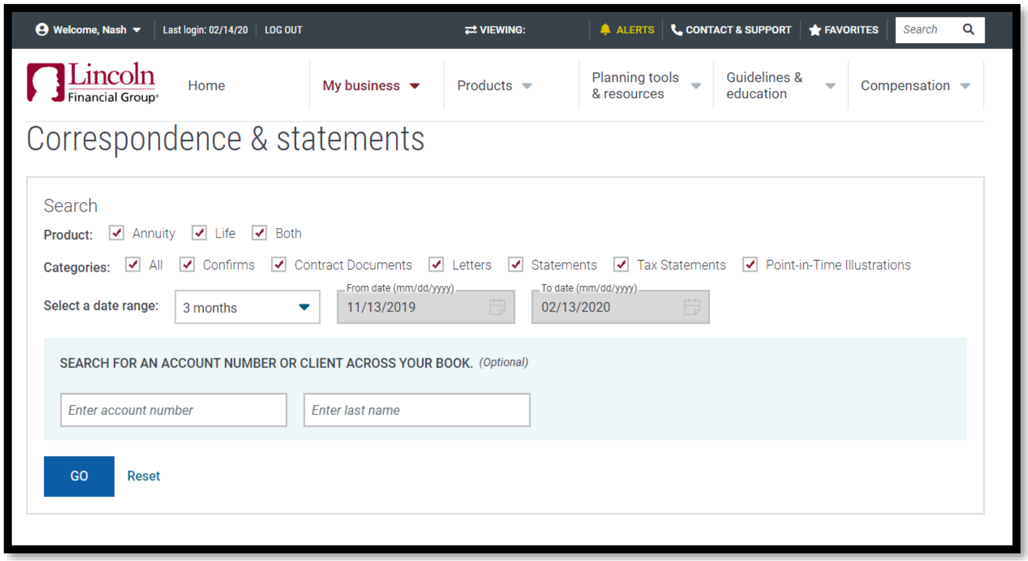

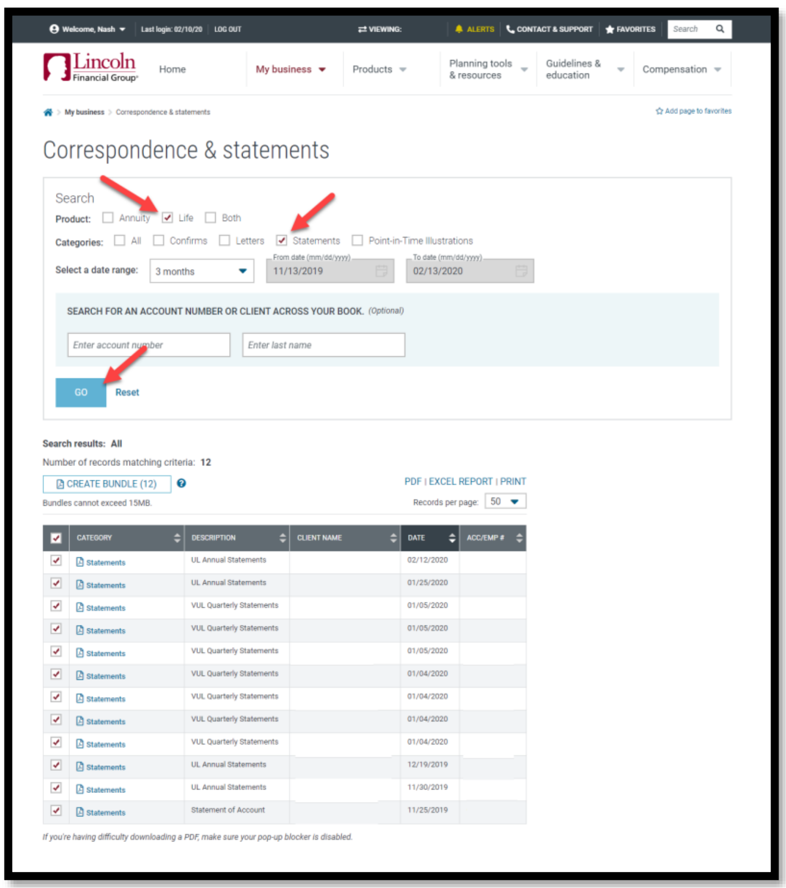

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