

Easier, better, faster

eDelivery of annuity contracts

Tips for a better eDelivery experience

- Check with your firm on eDelivery requirements
- Be sure to obtain a valid email address to ensure your client receives their contract
- Set a reminder to check the eDelivery status before it expires

Do business from wherever you are with eDelivery—the electronic way for you and your clients to receive annuity documents using secure email. It's easy to use, fast and secure.

Why eDelivery?



It's convenient

Easy to use and
saves time



It's safe

Secure delivery and
monitoring



It's green

Paperless and
contactless

3 simple steps to get started

1. Elect

If your firm is currently set up for eDelivery, you can skip to #2. If not, be sure to have your client elect eDelivery during the application process.

2. Open

You'll receive an email with a secure link to DocFast—the tool we use for eDelivery. You may be required to review and act on the documents in order for the electronic contract to be sent to your client. If not, you can still view the contract and its status.

3. Accept

You'll be copied on your client's email notification. They must click the link in the email, log on to the consumer portal and acknowledge receipt of their contract before the eDelivery window expires. Once they acknowledge receipt, you'll receive a confirmation email. If the eDelivery window expires, a paper contract will be mailed.

- The eDelivery window expires 10 business days from initial sent date.

Please note: eDelivery is not available for trust-owned contracts.

Insurance products issued by:
The Lincoln National Life Insurance Company
Lincoln Life & Annuity Company of New York

For financial professional use only. Not for use with the public.

Not a deposit
Not FDIC-insured
Not insured by any federal government agency
Not guaranteed by any bank or savings association
May go down in value

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LCN-3486527-031021

PDF 4/21 **Z02**

Order code: FA-EDLVR-FLI001



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There is no additional tax-deferral benefit for an annuity contract purchased in an IRA or other tax-qualified plan.

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