

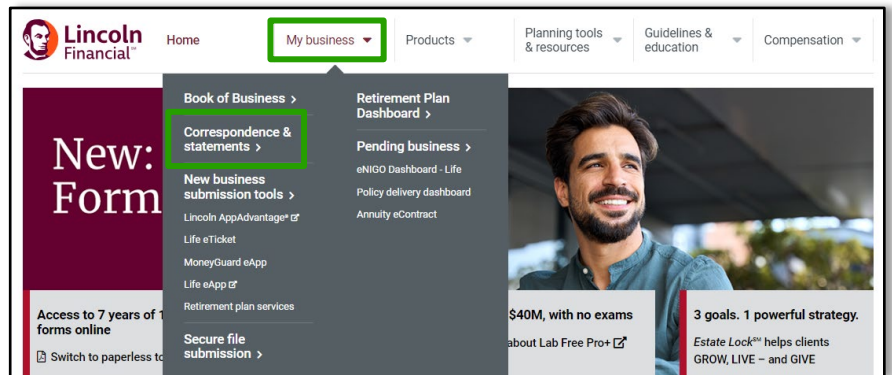
ANNUITY SOLUTIONS

Client Correspondence and Statements

The [Lincoln Producer Website](#) helps Financial Professionals manage their annuity business, drive efficiencies and reduce turnaround times. Having an online account provides secure and convenient 24/7 access to client correspondence, statements and more!

How to Access

1. To access, users must [log in](#) or [register for a Lincoln online account](#).
2. Once logged in, go to **My Business** from the top menu and select **Correspondence and Statements**.



From here, users can pull statements, confirmations (including automatic withdrawal and one-time withdrawal confirmations), letters, contract documents, and tax statements by **individual account number or client name**, or in aggregate across your **full book of business** by using the filters provided. Users may also select multiple documents to create and download a **bundle** of all correspondence within one PDF file.

Correspondence & statements

Search

Product: ☒ Annuity ☐ Life ☐ Both

Categories: ☒ All ☒ Confirms ☒ Contract Documents ☒ Letters ☒ Statements ☒ Tax Statements

Select a date range: 12 months From date (mm/dd/yyyy) 11/20/2023 To date (mm/dd/yyyy) 11/20/2024

SEARCH FOR AN ACCOUNT NUMBER, CLIENT LAST NAME OR FINANCIAL PROFESSIONAL ACCOUNT

Account number Client last name Select a financial professional

GO Reset

Number of records matching criteria: 11

[CREATE BUNDLE \(8\)](#) ?

PDF | EXCEL REPORT | PRINT

Records per page: 50

<input checked="" type="checkbox"/>	CATEGORY	DESCRIPTION	CLIENT NAME	DATE	ACC/EMP #
<input checked="" type="checkbox"/>	Confirms	Contract Change	VALUED CLIENT	09/11/2024	XXXXXX
<input checked="" type="checkbox"/>	Confirms	Contract Change	VALUED CLIENT	03/15/2024	XXXXXX
<input checked="" type="checkbox"/>	Statements	Annual Statement and Reallocation Notice	VALUED CLIENT	03/15/2024	XXXXXX
<input checked="" type="checkbox"/>	Confirms	Reallocation Confirmation	VALUED CLIENT	01/24/2024	XXXXXX
<input checked="" type="checkbox"/>	Statements	Annual Statement and Reallocation Notice	VALUED CLIENT	01/23/2024	XXXXXX
<input checked="" type="checkbox"/>	Tax Statements	Annual Withdrawal Summary	VALUED CLIENT	12/29/2023	XXXXXX
<input checked="" type="checkbox"/>	Confirms	Reallocation Confirmation	VALUED CLIENT	12/07/2023	XXXXXX
<input checked="" type="checkbox"/>	Statements	Annual Statement and Reallocation Notice	VALUED CLIENT	12/02/2023	XXXXXX

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