

Ready to Sell Lookup tool FAQ

Frequently asked questions: Financial professionals

Q1. How do I access the Ready to Sell Lookup tool?

A1. You must have sold or are actively servicing a Lincoln policy to access the link on your LincolnFinancial.com profile. You'll find a link to the Ready to Sell Lookup tool on the landing page in the shortcut menu. There's also a link on the [Licensing & contracting](#) page.

Q2. If I'm told that I'm not in good order (NIGO) to sell a product, what can I do?

A2. Follow your current submission process to send information about your licensing and contracting updates to Lincoln. These methods include but aren't limited to working with your back office or submitting the appropriate documentation to Contracting@LFG.com.

Q3. Whom do I contact if I have questions about the information found in my Ready to Sell results?

A3. You may work with your back office or call Lincoln's Contact Center at 800-238-6252, option 1.

Q4. What if I don't know which product I want to sell?

A4. The Ready to Sell Lookup tool is designed to provide case-specific details about your status. Once you know the type of product you want to sell, come back and check the tool.

Q5. If my contracting request hasn't been processed by Lincoln, can I still use the tool?

A5. No. The tool is only available for those financial professionals who have been set up on our system.

Q6. If the firm I'm selling the business through isn't listed, what do I do?

A6. Search for your firm using its name or tax ID. Or skip the firm selection. If the firm selection is skipped, additional Ready to Sell checks won't be run for firm-specific requirements. We recommend always performing the Ready to Sell Lookup with a firm selected.

Q7. If the client's resident state is different from the state where the business is being solicited or signed, do I need to indicate that?

A7. Yes. Some states have additional requirements when a client signs an application outside of their resident state. It's important to answer this question to ensure there isn't a delay in issuing the policy.

Q8. Can the Ready to Sell Lookup tool be used to check fee-based products in New York?

A8. No. At this time, the Ready to Sell Lookup won't validate fee-based products in New York. A note on the Product selection page reminds you that this validation isn't currently available.

Q9. What if I want to look up information about someone else?

A9. Your results will be limited based on your LFD.com profile. You won't be able to look up other individuals using the Ready to Sell tool.

Q10. How quickly is information updated in the Ready to Sell Lookup tool?

A10. Changes are reflected in the Ready to Sell tool an hour after updates are made to Lincoln's system of record.

Q11. Does the Ready to Sell tool know what products I can sell through my firm?

A11. No. Currently, the Ready to Sell tool doesn't manage product-selling group agreements. Please check with your firm's back office if you have questions about which products may be sold.

Q12. Does the Ready to Sell tool consider reciprocity for my NAIC annuity and long-term care state training requirements?

A12. Yes. These rules are built into the platform to ensure you get an accurate result when checking whether you can sell a product.

Frequently asked questions: Firms

Q1. How do I access the Ready to Sell Lookup tool?

A1. Log in to your [LincolnFinancial.com profile](#). You'll find a link to the Ready to Sell Lookup on the landing page in the shortcut menu. There's also a link on the **Licensing & contracting** page. If you don't see a link, work with your relationship manager to request that it be added to your page.

Q2. What if I get the message "Financial Professional not found" when searching the tool?

A2. This could mean one of four things:

1. Your search criteria need to be updated because the inputs don't match the data in Lincoln's systems.
2. The financial professional hasn't submitted a contracting request to Lincoln, has never sold a policy, and isn't currently servicing any business.
3. The financial professional hasn't submitted a contracting request to Lincoln, has never sold a policy, and/or isn't currently servicing any business.
4. The financial professional isn't actively affiliated with your firm on Lincoln's systems.

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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Q3. Can I look up information on any financial professional?

A3. No. You can only look up information about financial professionals for whom Lincoln shows an active relationship with your firm. If there isn't an active relationship, the financial professional won't be shown in your search results.

Q4. How quickly is information updated in the Ready to Sell tool?

A4. Changes are reflected in the Ready to Sell tool an hour after updates are made to Lincoln's system of record.

Q5. Does the Ready to Sell Lookup tool know what products our firm offers?

A5. No. Currently, the Ready to Sell tool doesn't manage product-selling group agreements.

Q6. If our firm has a preferred product training vendor, will financial professionals be prompted to go to its site?

A6. Yes. If your firm uses a specific product training vendor for its proprietary products and your firm is selected, the financial professional NIGO messaging would reflect this vendor if the product training requirements have not been met.

Q7. Whom do I contact if I have questions about the information found in the Ready to Sell results?

A7. Call the Lincoln Contact Center at **800-238-6252, option 1**, for questions about Ready to Sell requirements.

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