

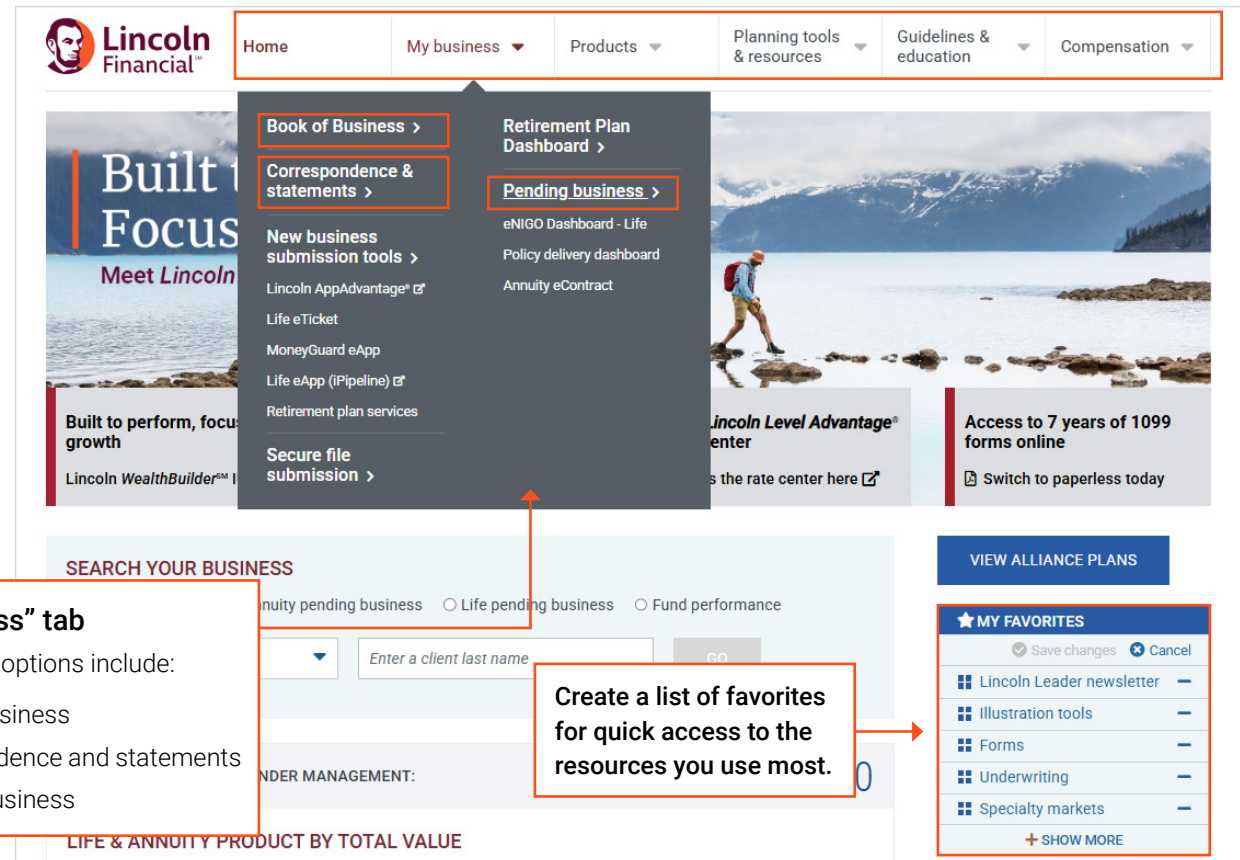
Service, at your fingertips

Financial professional home page

How to get here: Visit LFD.com and sign in.

Note several menu navigation options across the top.

This quick-reference guide walks you through some of our most popular online tools as you prepare for annuity client meetings or reviews.



The screenshot shows the Lincoln Financial professional home page. At the top, a navigation bar includes links for Home, My business, Products, Planning tools & resources, Guidelines & education, and Compensation. Below this, a large central area features a 'Book of Business' dropdown menu with options like 'Correspondence & statements', 'New business submission tools', and 'Pending business'. To the right, there's a 'Retirement Plan Dashboard' and a 'Pending business' section. Below the main content, there's a 'SEARCH YOUR BUSINESS' section with filters for 'Annuity pending business', 'Life pending business', and 'Fund performance'. On the right side, there's a 'VIEW ALLIANCE PLANS' button and a 'MY FAVORITES' section with a list of items like 'Lincoln Leader newsletter', 'Illustration tools', 'Forms', 'Underwriting', and 'Specialty markets'. Annotations with red boxes and arrows highlight the 'My business' tab, the 'Book of Business' dropdown, the 'Pending business' section, and the 'MY FAVORITES' list.

"My business" tab
Most popular options include:

- Book of business
- Correspondence and statements
- Pending business

Create a list of favorites for quick access to the resources you use most.

Account details page

How to get here: Book of business > select an account to view > account details page

1 Download contract

Access a full color PDF of the original contract.

2 Personal rate of return

Get historic results with any date range, from contract inception to yesterday's close.

3 Protection for clients and loved ones

Access your client's living and death benefit details.

4 Statement on demand

Access client's current account details, rather than waiting for a quarterly statement.

5 Contract basics

See total contributions, withdrawals, surrender value and free amount.

6 RMD calculator

Calculate client's RMD amount based on contract details on file.¹

7 Additional investment calculator

Show your clients the power of adding money to their contract, and what it means for future income.

Contract #:
Plan name: AMERICAN LEGACY SERIES L-SHR

Owner: Client is not registered.	Market type: IRA Type: Variable Annuity Status: Active Issued: 02/02/2015	Annuitant: Financial professional(s):	Contact us
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Account details [Download contract](#) [ALL](#) [PDF](#) [PRINT](#) [Back to search results](#)

[Account value](#) [Personal rate of return](#) [Contract rider](#) [Death benefit](#)

Account values as of 01/27/2022: **\$69,085.36** [PRINT](#)

[Statement on demand](#) [?](#)

Total contributions	\$77,026.53
Total withdrawals	\$18,635.55
Surrender value [†]	\$68,861.36
Available free amount [†]	\$68,785.36

(RMD) Required minimum distribution calculator

Additional investment calculator

- [Account details](#)
- [My information/Beneficiaries](#)
- [Account activity](#)
- [Account management](#)
- [Withdrawal-AWS](#)
- [100% fund options](#)
- [Individual fund options](#)
- [Correspondence/Statements](#)
- [Performance and prospectus](#)
- [Service forms](#)
- [Historic unit values](#)

¹ RMD calculator will only show if the client has a qualified account and meets RMD requirements.

Money out

How to get here: Book of business > select client's account > account details > Withdrawal-AWS

Request a one-time withdrawal, modify or set up new automatic withdrawals, and review existing automatic withdrawals (including required minimum distributions) on the client's behalf. Availability of the withdrawal feature is subject to firm approvals.

Account details [Download contract](#)

ALL: [PDF](#) [PRINT](#) [Back to search results](#)

[Account values](#) [Personal rate of return](#) [Death benefit](#)

Account values as of 01/27/2022: **\$210,187.18**

[Statement on demand](#) [?](#)

Total contributions	\$142,972.12
Total withdrawals	\$0.00
Surrender value [†]	\$202,999.00
Available free amount [†]	\$90,384.1

[PRINT](#)

[Withdrawal-AWS](#)

[Transfer funds](#)

[Current value reallocation](#)

[Change future allocations](#)

[Service features](#)

Withdrawal

You can take a one-time withdrawal, or set up a systematic withdrawal.

I want to

Take a one-time withdrawal

Set up an automatic withdrawal

[Current withdrawal details](#)

No current withdrawals on this account.

[Back to search results](#)

[Account details](#)

[My information/Beneficiaries](#)

[Account activity](#)

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[Portfolio rebalance](#)

[Correspondence/Statements](#)

The feature will open and provide appropriate options to choose from.

Click here to view details on existing withdrawal programs.

Account activity

How to get here: Book of business > select client's account > account activity

View previous transactions such as additional contributions, fund transfers, withdrawals, and more.

Account activity

Historical activityPending activity

Historical activity

Filter by last: Custom date range

From date (mm/dd/yyyy)
07/06/2015

To date (mm/dd/yyyy)
02/03/2022

Show: ☒ Payments/Deposits ☒ Withdrawals ☒ Fund transfers ☐ Miscellaneous charges

GO

Search results: July 06, 2015 through February 03, 2022

PDF | EXCEL | PRINT

Number of records matching criteria: 10

DATE	ACTIVITY	AMOUNT
11/05/2021	Withdrawal	\$10,203.30
11/05/2020	Withdrawal	\$7,165.60
01/30/2020	Transfer	\$21,110.62
01/30/2020	Transfer	\$53,992.74
11/05/2019	Withdrawal	\$5,599.34
11/05/2018	Withdrawal	\$6,133.76
11/03/2017	Withdrawal	\$4,916.83
11/04/2016	Withdrawal	\$4,559.74
11/05/2015	Withdrawal	\$4,579.63
07/06/2015	Contribution	\$124,800.84

Back to search results

Account details

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Change future allocations

Correspondence/Statements

Performance and prospectus

Service forms

Historic unit values

Correspondence and statements

How to get here:

- **Individual contract access:** Book of business > select client's account > correspondence/statements
- **Full book of business access:** My business > correspondence/statements

Pull statements, confirmations—including automatic withdrawal and one-time withdrawal confirmations—letters, contract documents, and tax statements by individual client and contract or in aggregate across your full book of business. You can also create a bundle of multiple client documents into one PDF.

Correspondence & statements

Search

Product: Annuity

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

Select a date range: 3 months

From date (mm/dd/yyyy)
10/27/2021

To date (mm/dd/yyyy)
01/27/2022

SEARCH FOR AN ACCOUNT NUMBER OR CLIENT LAST NAME ACROSS YOUR BOOK. (Optional)

Account number

Client last name

GO Reset

Search results: All

Number of records matching criteria: 720

CREATE BUNDLE (720)

PDF | EXCEL REPORT | PRINT

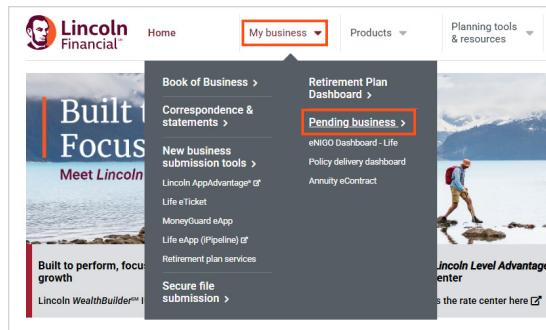
Bundles cannot exceed 15MB. Records per page: 50

<input checked="" type="checkbox"/>	CATEGORY	DESCRIPTION	CLIENT NAME	DATE	ACC/EMP #
<input checked="" type="checkbox"/>	Confirms	Contract Change		01/26/2022	
<input checked="" type="checkbox"/>	Confirms	Contract Change		01/26/2022	
<input checked="" type="checkbox"/>	Contract Documents	Contract Document		01/25/2022	
<input checked="" type="checkbox"/>	Confirms	Contract Change		01/25/2022	
<input checked="" type="checkbox"/>	Letters	Contract Notification		01/25/2022	
<input checked="" type="checkbox"/>	Confirms	Contract Change		01/21/2022	
<input checked="" type="checkbox"/>	Confirms	Contract Change		01/21/2022	

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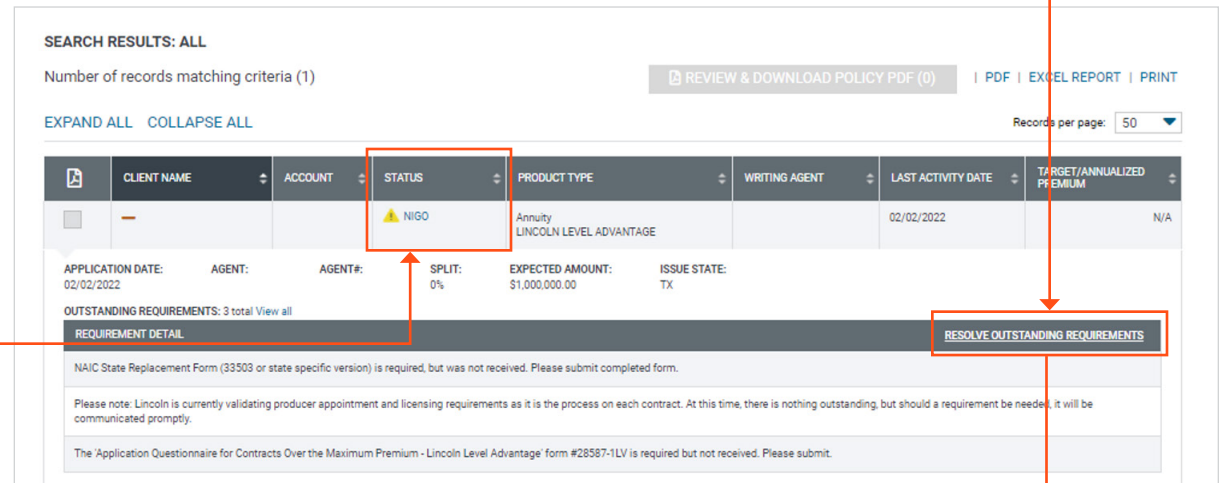
Pending business tool

How to get here: My business > pending business



Review new business cases, including those with additional requirements. The status can show as:

- Pending: in good order but not issued yet
- NIGO: not in good order – additional requirements needed
- Issued: issued contracts will show for 10 days after the effective date



Click this box to view and resolve NIGO requirements.

View detailed NIGO requirements, add comments and upload documents to resolve the issue. Outstanding requirements can only be submitted once with this tool. Contact your LFG New Business Case Coordinator to submit additional requirements.

The screenshot shows the 'Resolve outstanding requirements' form. It includes a 'VIEW REQUIREMENTS' section with a list of requirements, an 'ADD COMMENTS' section with a text area, and an 'ADD FILES' section with a file upload area.

Resolve outstanding requirements

Use the form below to upload comments or files related to the outstanding requirements for this account.

Contract # | Owner:

VIEW REQUIREMENTS

The following outstanding requirements are for informational purposes only and do not require comments or files for resolution

Please note: Lincoln is currently validating producer appointment and licensing requirements as it is...

ADD COMMENTS

To resolve the following outstanding requirements, please enter information for each requirement individually.

The Application Questionnaire for Contracts Over the Maximum Premium - Lincoln Level Advantage form...

Add comment

ADD FILES

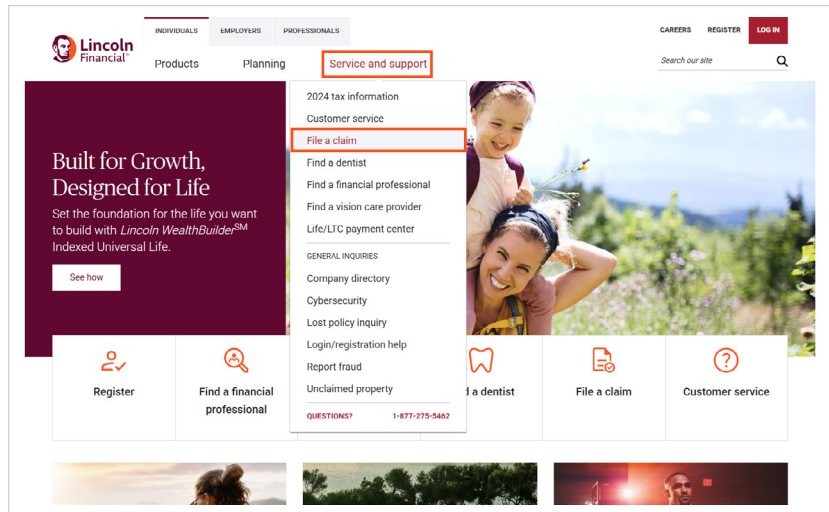
To resolve the following outstanding requirements, please upload the corresponding files needed to resolve the requirements. You may upload the files individually or in one file. View file requirements

NAIC State Replacement Form (3503 or state specific version) is required, but was not received. Please...

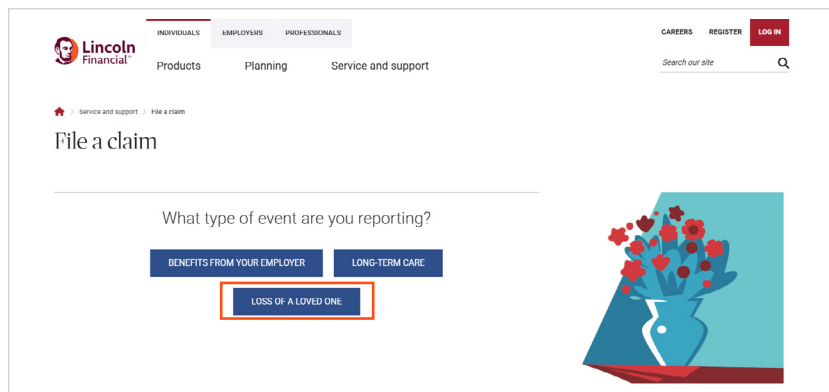
Start a death claim

How to get here: LincolnFinancial.com > service and support > file a claim

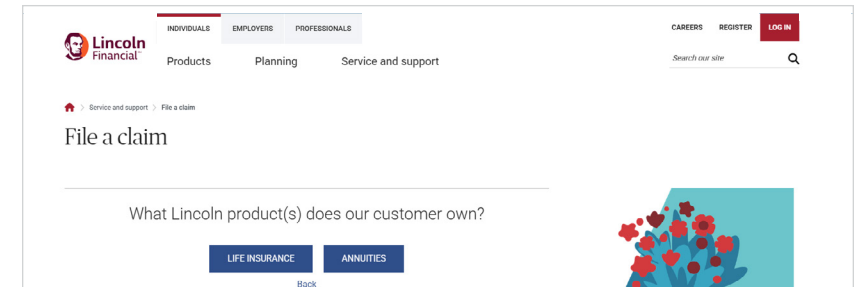
Beneficiaries can start the death claim process online without having to log in.



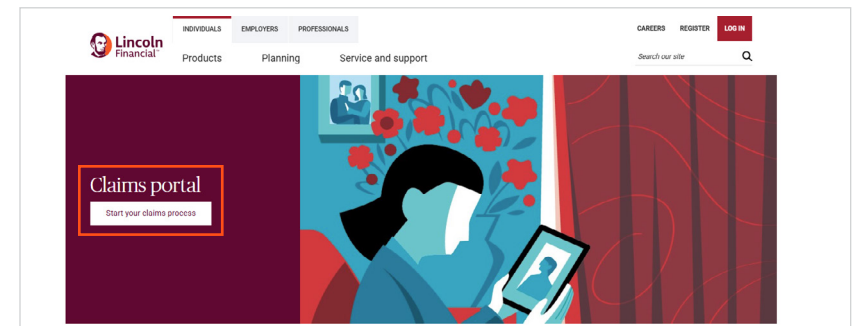
1. They'll select what type of event they're reporting. For a death claim, select "Loss of a loved one."



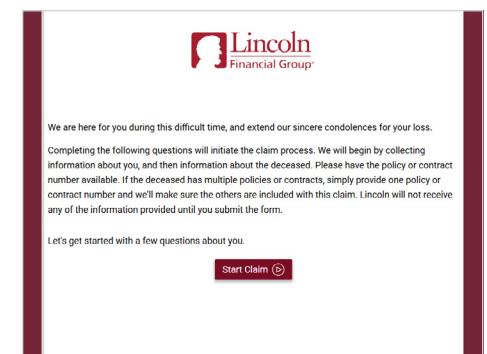
2. Then they'll select what type of product they're filing a claim for.



3. They'll be brought to our claims portal launch page. From there, they can click either "Start your claims process" or "File an annuity death claim." Both buttons will launch a new window and bring them to the claims processing system.



4. Beneficiaries can begin the claim process by answering a few questions about themselves and the deceased.





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Our priority.™



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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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