

Always know the status of your annuity new business accounts — and more!

Register on LincolnFinancial.com to receive alerts. It's quick and easy!

You can now receive alerts via text and/or email to give you the status of your **annuity new business** accounts. This makes it easier to stay on top of which new accounts are in good order — and which ones need further action. You can also receive alerts for client reallocation windows so you can reach out in a timely manner to assist them.

Click on "Alerts" icon at the top of your home page

Choose settings

Confirm or enter your email address (you can also delegate this or add up to three emails)

Confirm number you wish to receive text alerts (you can also delegate this)

Select if you would like to restrict alerts to business hours

You can globally turn your alerts on or off

You can globally elect texts or emails

You can specify which alerts you would like to receive via text or email

Confirm your updated information and press save

SAVE CHANGES

The screenshot shows the user interface for managing alerts. At the top, there's a navigation bar with "Alerts" and "Settings" tabs. Below this, a section titled "Contact information" allows users to enter their primary email (test@ifg.com) and mobile number. There are two toggle switches: one for "Only receive alerts during business hours Mon-Fri 8 a.m. to 8 p.m. ET" (set to ON) and another for "Turn on all email and text alerts" (set to OFF). Below these are two sections for selecting alert types: "ANNUITY NEW BUSINESS ALERTS" and "ANNUITY INFORCE ALERTS". Each section has a table with columns for "Alert type", "Email", and "Text". In the "ANNUITY NEW BUSINESS ALERTS" section, all alert types have "Email" checked and "Text" unchecked. In the "ANNUITY INFORCE ALERTS" section, "Indexed Variable Annuity Reallocation" and "Fixed Indexed Annuity Reallocation" have "Email" checked and "Text" unchecked, while "Defined Outcome Funds Close to Cap or Buffer" has both "Email" and "Text" unchecked. A "SAVE CHANGES" button is at the bottom.

If you have any questions, please contact LFD Support at 877-533-1022.

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