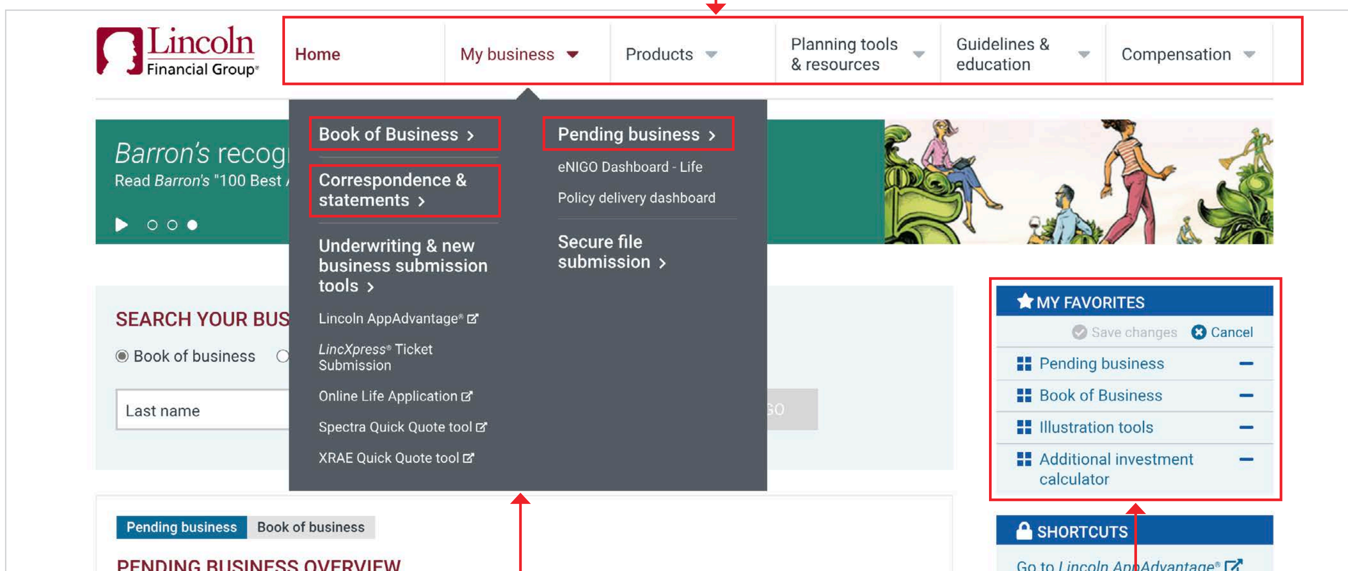
Service, at your fingertips

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

Financial professional home page

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

Note several menu navigation options across the top.



"My business" tab

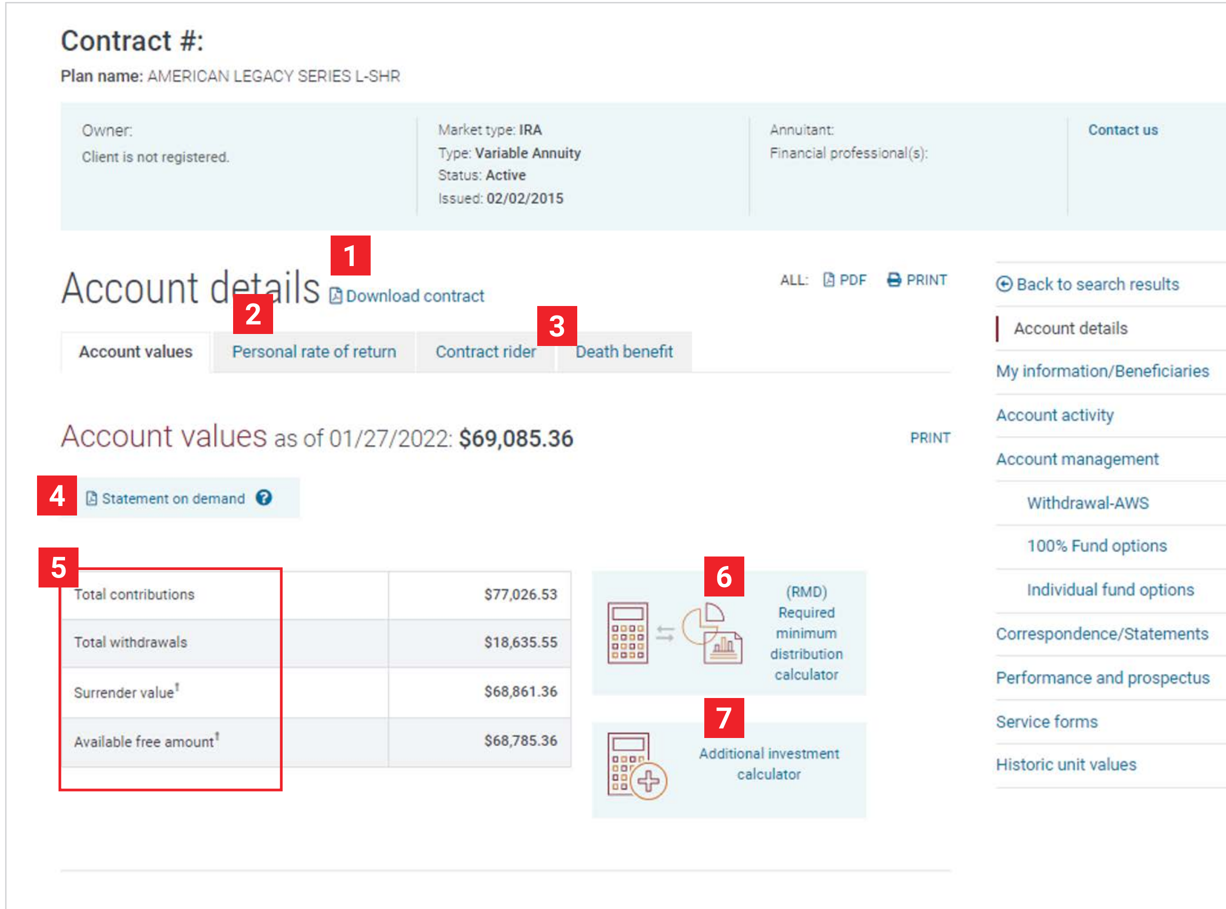
Most popular options include:

- 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.*

7 Additional investment calculator

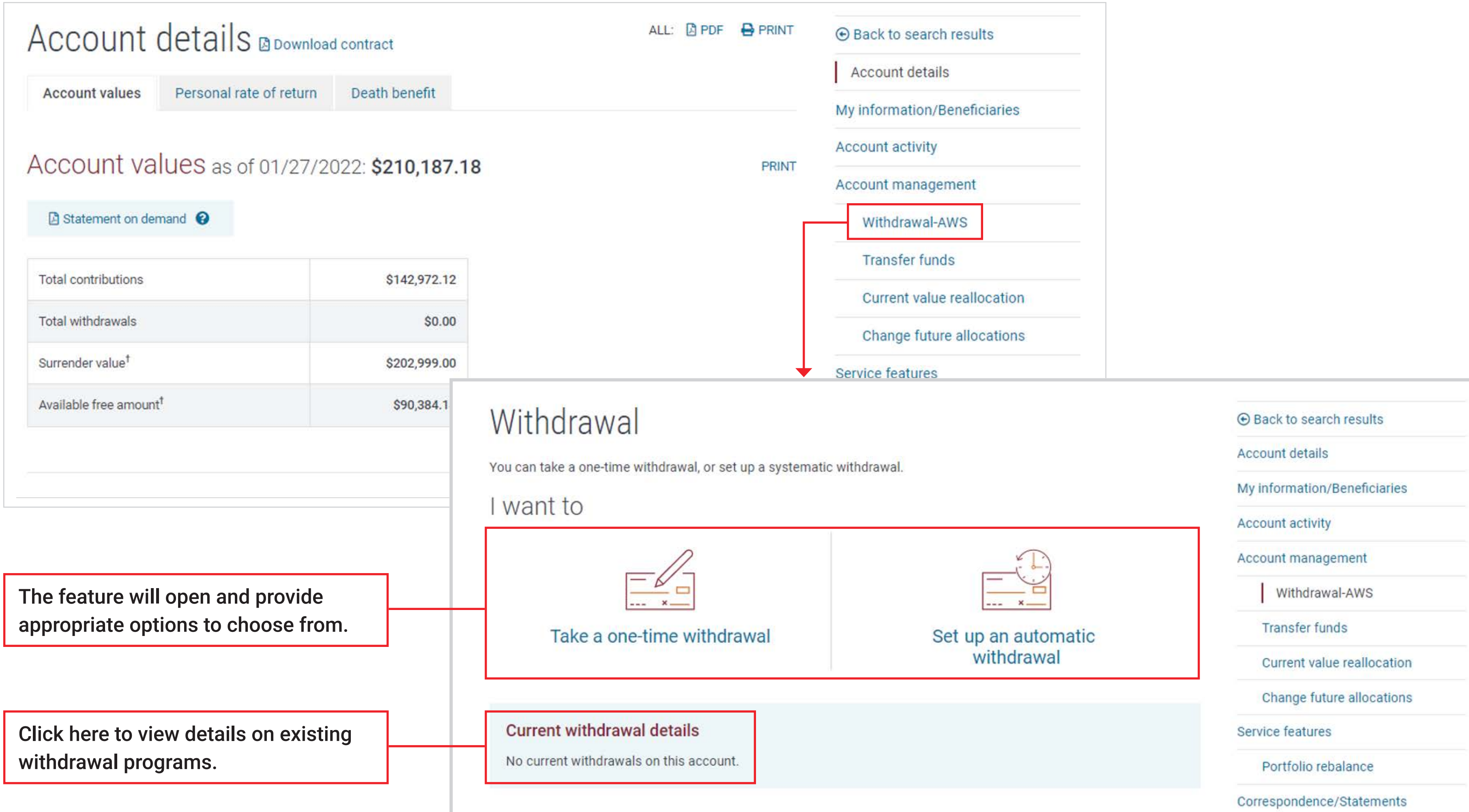
Show your clients the power of adding money to their contract, and what it means for future income.

*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

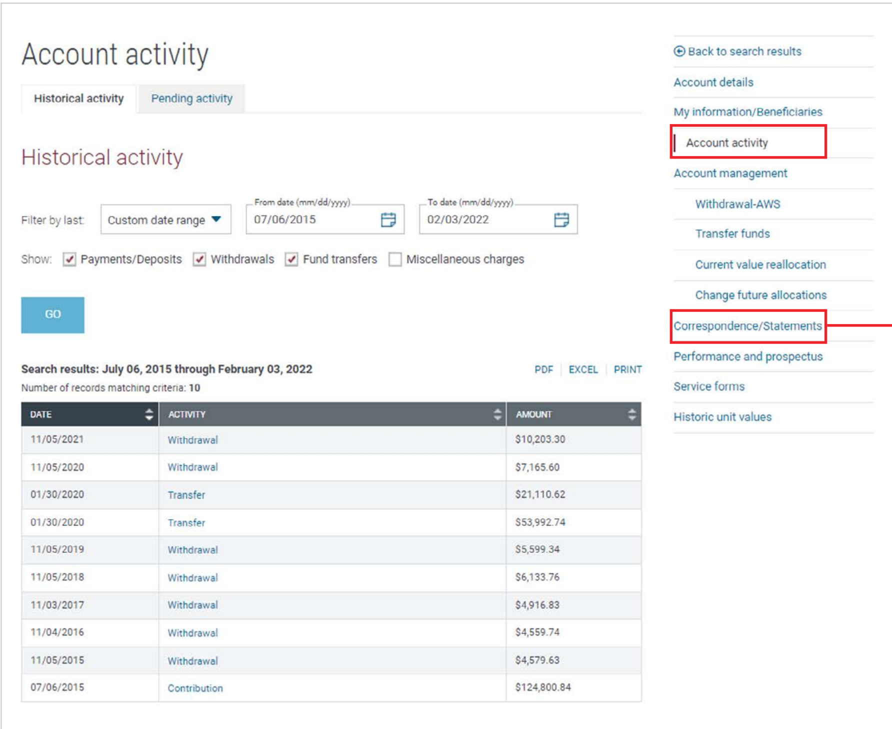
Request a one-time withdrawal, modify or set up new automatic withdrawals, and review existing automatic withdrawals (including required minimum distributions) on the client's behalf. Availability of the withdrawal feature is subject to firm approvals.



Account 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.

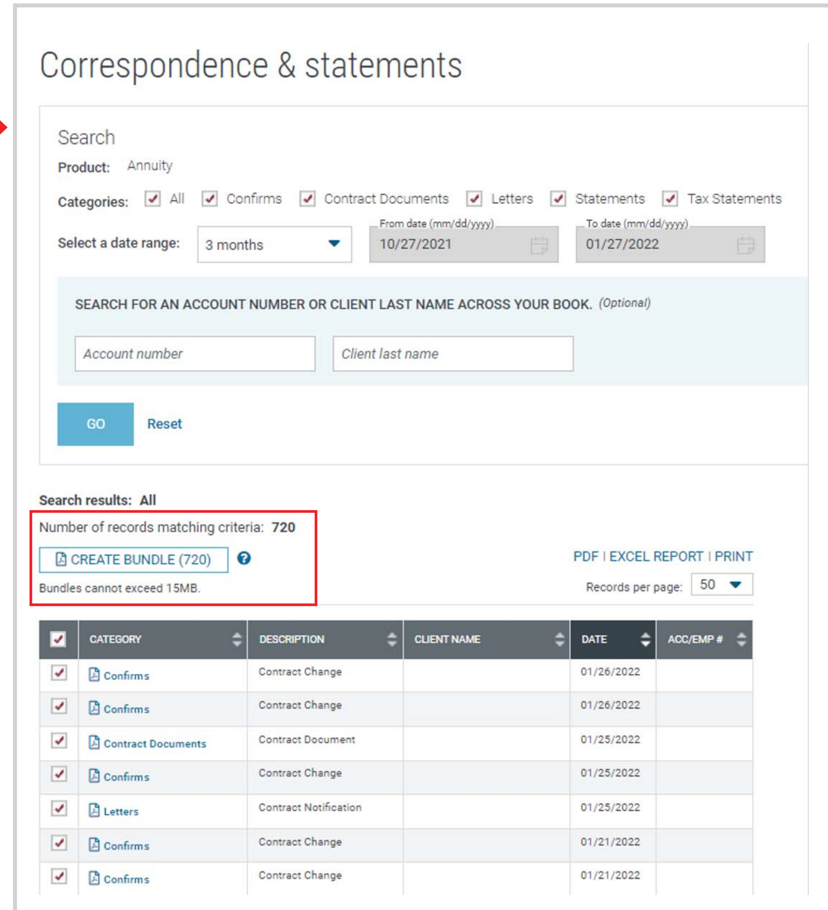


Correspondence and statements

How to get here:

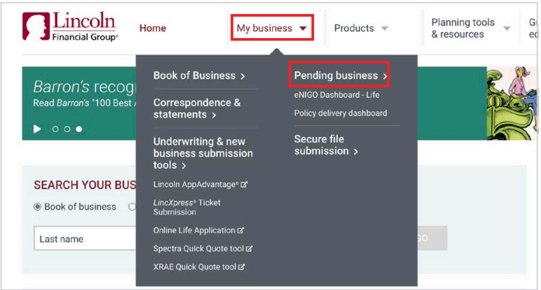
- **Individual contract access:** Book of business > select client's account > correspondence/statements
- **Full book of business access:** My business > correspondence/statements

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.



Pending business tool

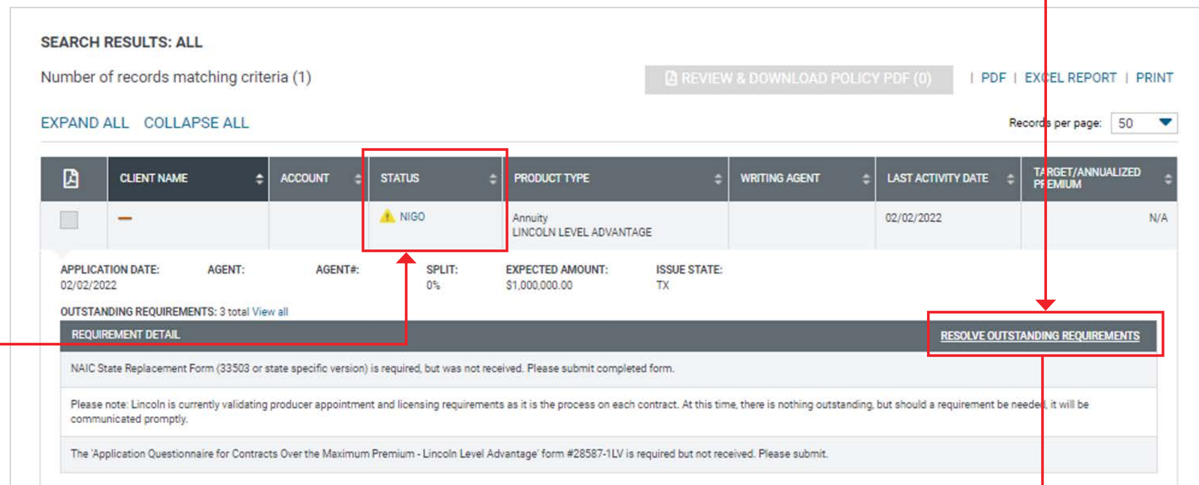
How to get here: My business > pending business



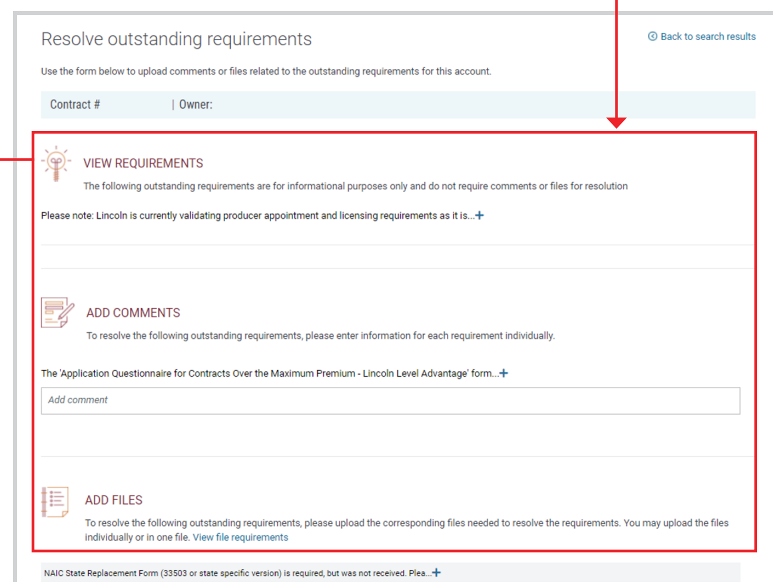
Review new business cases, including those with additional requirements. The status can show as:

- 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.



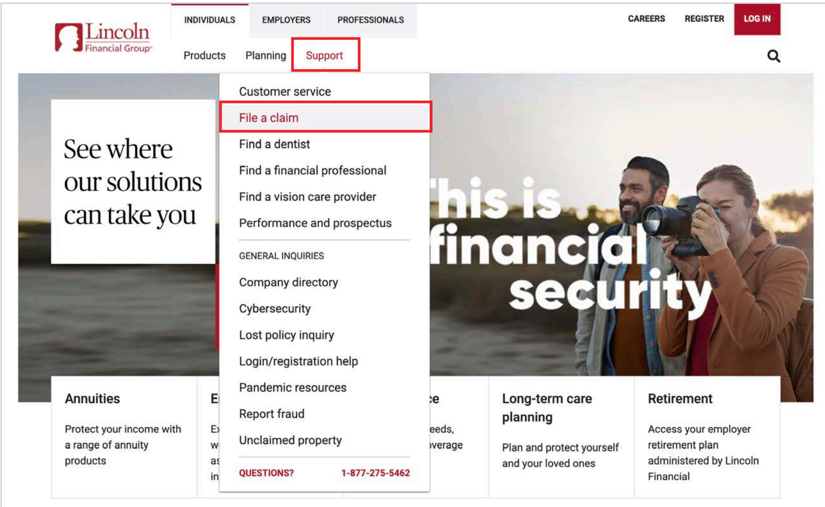
View detailed NIGO requirements, add comments and upload documents to resolve the issue. Outstanding requirements can only be submitted once with this tool. Contact your LFG New Business Case Coordinator to submit additional requirements.



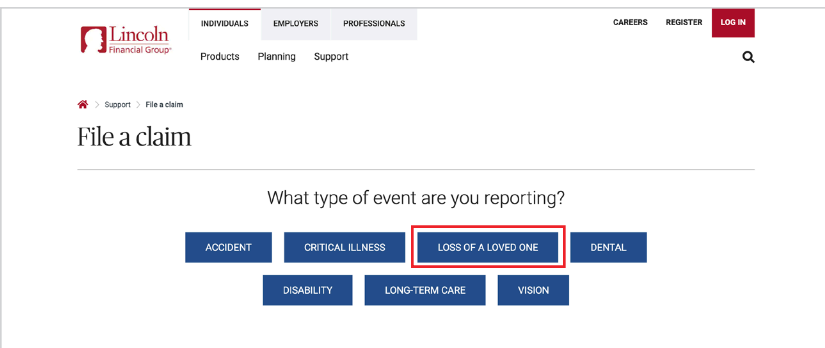
Start a death claim

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

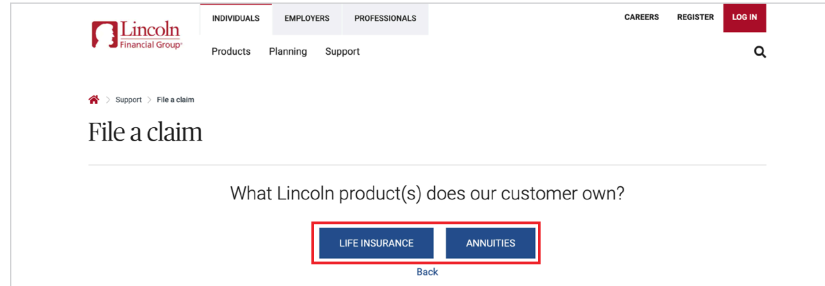
Beneficiaries can start the death claim process online without having to log in.



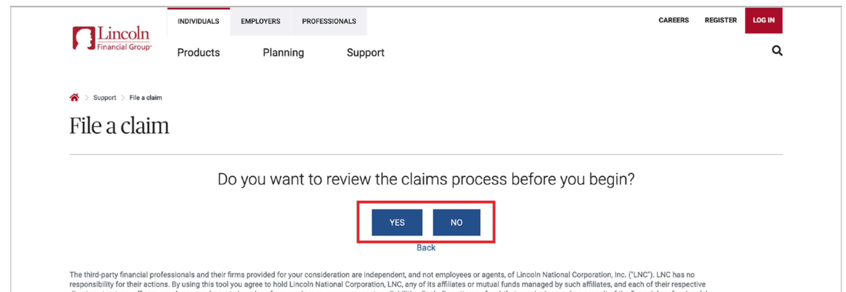
1. They'll select what type of event they're reporting. For a death claim, select "Loss of a loved one."



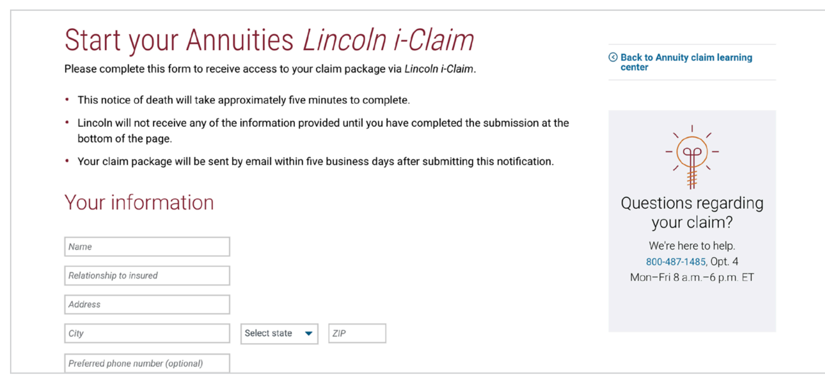
2. Then they'll select what type of product they're filing a claim for.



3. They'll be asked if they want to review the claims process. Choosing "No" will send them directly to the claim submission tool.



4. Beneficiaries can begin the claim process by completing the form to receive access to the claim package.



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