

## Annuity and Life Insurance Notification Options

### Financial Professionals

Financial Professionals can see their specific notification options by logging into the Lincoln Producer Website, clicking their name in the top left corner, and selecting one of the **dropdown options** listed. They can access additional correspondence by logging in, navigating to “My Business,” and selecting “**Correspondence & Statements!**”

Notification	Description	Email	Paper	Notification Eligibility
<b>New and Pending Case Status Updates</b>	Notifications regarding new and pending cases	☑ Default	✗ Not available	☑ Available for all pending Life policies ☑ Available for all pending Annuity policies
<b>Premium Due &amp; Lapse Pending</b>	Notification of premium due or grace period start date	☑ <a href="#">Opt-In Available</a>	✗ Not available	☑ Available for <u>some</u> Life policies ✗ Not available for Annuity policies
<b>Annual &amp; Quarterly Statements</b>	Notification that outlines the current health of a policy	☑ Default	Available	☑ Available for some Life policies ✗ Not available for Annuity policies
<b>VUL Confirm Letters</b>	Notification of various financial transactions that have been processed	☑ Default	Available	☑ Available for Variable Universal Life (VUL) policies only ✗ Not available for Annuity policies
<b>Reallocations</b>	Notification of when fund allocations have been updated	☑ <a href="#">Opt-In Available</a>	✗ Not available	✗ Not available for Life policies ☑ Available for Annuity policies
<b>Defined Outcome Funds Close to Cap or Buffer</b>	Notification of when a fund is close to the top (cap) or bottom (buffer) of expected outcome)	☑ <a href="#">Opt-In Available</a>	✗ Not available	✗ Not available for Life policies ☑ Available for Annuity policies

### Consumers

Consumers can see their specific notification options by logging into their online account, clicking their name in the top left corner, and selecting “**Communication Preferences.**”

Notification	Description	Email	Paper	Notification Eligibility
<b>Billing Statements (eBill)</b>	Notification of when the consumer’s premium is due	☑ <a href="#">Opt-In Available</a>	Default	☑ Available for <u>some</u> Life policies ✗ Not available for Annuity policies
<b>Payment (ePay)</b>	Notification validating that a one-time ePay premium payment has successfully processed	☑ Default	✗ Not available	☑ Available for <u>some</u> Life policies ☑ Available for ePay payments on Lincoln’s website only ✗ Not available for Annuity policies
<b>Tax Statements</b>	Annual notification when a tax statement is ready to view online	☑ <a href="#">Opt-In Available</a>	Default	☑ Available for all Life policies ☑ Available for all Annuity policies

**Availability may vary by product, system and/or firm approval.**

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