

Digital PDF Policy Delivery

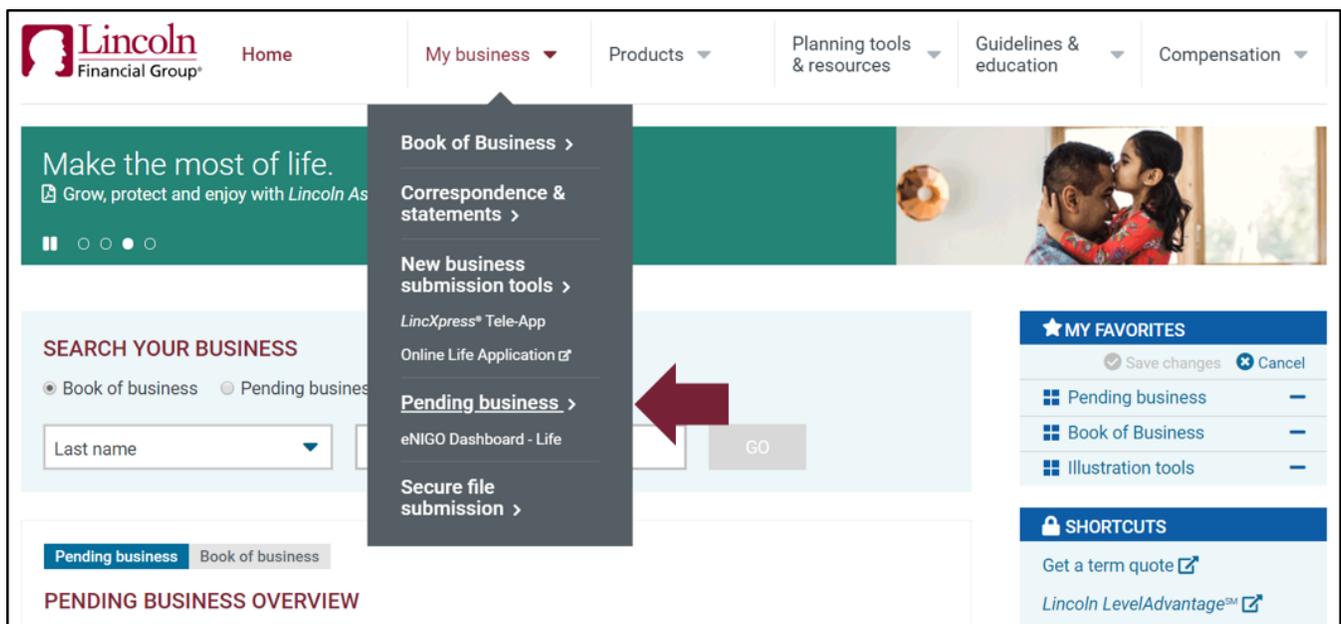
Self-Service Access

Lincoln generates a PDF of issued life insurance policies which can be used for policy delivery or downloaded to maintain with client's records. A policy PDF is available for all UL, IUL, VUL, *Lincoln LifeElements*® Term and *Lincoln MoneyGuard*® solutions. Because *Lincoln TermAcce!*® is a fully electronic process from submission to delivery, a policy PDF is unavailable as the policy delivery method.

Accessing the Policy PDF

Partners can download a PDF of issued policies directly from Lincoln's producer website.

1. Log-In to Lincoln's producer website
2. From the "My Business" tab, select "Pending Business"



The screenshot displays the Lincoln Financial Group producer website interface. At the top, there is a navigation bar with the Lincoln logo and several menu items: Home, My business (with a dropdown arrow), Products (with a dropdown arrow), Planning tools & resources (with a dropdown arrow), Guidelines & education (with a dropdown arrow), and Compensation (with a dropdown arrow). Below the navigation bar, there is a main content area. On the left, there is a green banner with the text "Make the most of life." and "Grow, protect and enjoy with Lincoln As". Below this is a search section titled "SEARCH YOUR BUSINESS" with radio buttons for "Book of business" and "Pending business". A search input field labeled "Last name" and a "GO" button are visible. A dark grey dropdown menu is open over the "My business" tab, listing several options: "Book of Business >", "Correspondence & statements >", "New business submission tools >", "LincXpress® Tele-App", "Online Life Application ⌘", "Pending business >" (highlighted with a red arrow), and "Secure file submission >". On the right side of the page, there is a "MY FAVORITES" section with a "Save changes" button and a "Cancel" button, listing "Pending business", "Book of Business", and "Illustration tools". Below that is a "SHORTCUTS" section with links for "Get a term quote" and "Lincoln LevelAdvantage™". At the bottom of the page, there is a "PENDING BUSINESS OVERVIEW" section.

3. From the "Pending List" view, search for a specific policy or group of policies by status
4. If the policy listed contains a policy print PDF document, the check box will be enabled for selection
5. User can select up to 5 policy print PDFs to be downloaded at one time
6. Click "Review & Download Policy PDF" to begin the download process
7. Each downloaded policy will be created and saved as a separate PDF

Pending list

Search
 ✓ Issued, Placed
 + Select status

Show accounts with outstanding requirements from selected statuses.

Last Activity Date: 03/20/2020
Retrieves records from last activity date to today.

GO Reset

SEARCH RESULTS: 03/20/2020
 Number of records matching criteria (51)

REVIEW & DOWNLOAD POLICY PDF (5) | PDF | EXCEL REPORT | PRINT

	CLIENT NAME	ACCOUNT	STATUS	PRODUCT TYPE	WRITING AGENT	LAST ACTIVITY DATE	TARGET/ANNUALIZED PREMIUM
<input type="checkbox"/>	+ TEST, CLIENT 1	UL0000001	ISSUED			11/12/2018	
<input checked="" type="checkbox"/>	+ TEST, CLIENT 2	UL0000002	ISSUED				
<input type="checkbox"/>	+ TEST, CLIENT 3	UL0000003	ISSUED				
<input checked="" type="checkbox"/>	+ TEST, CLIENT 4	UL0000004	ISSUED				
<input checked="" type="checkbox"/>	+ TEST, CLIENT 5	UL0000005	ISSUED				
<input checked="" type="checkbox"/>	+ TEST, CLIENT 6	UL0000006	ISSUED				
<input checked="" type="checkbox"/>	+ TEST, CLIENT 7	UL0000007	ISSUED				

Review & download policy documents

A maximum of 5 policies may be downloaded at one time.

Please review your selection and select the Download Policy PDF button to process your selection. The policy PDF documents will download in one zip file and each document will be created as a separate PDF. To remove a policy from your list, please select the X to the right of the desired policy number.

DOWNLOAD POLICY PDF (5)

- 1 TEST, CLIENT 2 - UL0000002
- 2 TEST, CLIENT 4 - UL0000004
- 3 TEST, CLIENT 5 - UL0000005
- 4 TEST, CLIENT 6 - UL0000006
- 5 TEST, CLIENT 7 - UL0000007

RETURN TO LIST Clear all selection

If you do not have access to Lincoln’s producer website, you can request a Secure Email Policy PDF by indicating your request on the Cover Letter, or you may contact your Lincoln New Business Associate directly.

To learn more about the capabilities and benefits of Lincoln’s Pending Case Status Tools, view this [overview video](#):



Please contact your dedicated Lincoln Underwriting and New Business team with questions.

Life insurance issued by The Lincoln National Life Insurance Company, Fort Wayne, IN and Lincoln Life & Annuity Company of New York, Syracuse, NY, and distributed by Lincoln Financial Distributors, Inc., a broker-dealer. Contractual obligations are backed by the claims-paying ability of the issuing insurance company. The Lincoln National Life Insurance Company does not solicit business in the state of New York, nor is it authorized to do so. Lincoln Financial Group is the marketing name of Lincoln National Corporation and its affiliates.