

Ready to Sell Lookup Tool

Frequently Asked Questions

Ready to Sell Lookup is a self-service tool that gives the ability to check a producer's registration, licensing, appointments, contracting and more! The tool can be utilized by life insurance and annuity firm back-office users and financial professionals who are contracted with Lincoln and have an active agent code.

For Financial Professionals

Subject to State and/or Agency/Firm Approval

Question	Answer
Who can access the Ready to Sell Lookup tool?	Agency/Firm back-office staff and financial professionals with an active agent code have access and will see the Ready-to-Sell link when logged in to LincolnFinancial.com. Financial professionals who are registered on Lincoln's producer website as a prospect will not have access to the tool. In addition, some firms have restrictions from using the tool.
How do I access the Ready to Sell Lookup tool?	You must have sold or are actively servicing a Lincoln policy to access the link on your LincolnFinancial.com profile. You'll find a link to the Ready to Sell Lookup tool on the landing page in the shortcut menu. There is also a link on the licensing and contracting page.
If I'm not in good order (NIGO) to sell a product, what can I do?	Follow your current submission process to send information about your licensing and contracting updates to Lincoln. These methods include but are not limited to, working with your back office, or submitting the appropriate documentation to Contracting@LFG.com .
Whom do I contact if I have questions about the information found in my Ready to Sell results?	You may work with your back office or call Lincoln's Contact Center at 800-238-6252.
What if I don't know which product I want to sell?	The Ready to Sell Lookup tool is designed to provide case-specific details about your status. Once you know the type of product you want to sell, come back and check the tool.
If my contracting request hasn't been processed by Lincoln, can I still use the tool?	No. The tool is only available for those financial professionals who have been set up on our system of record.

What do I do if the firm I'm selling the business through isn't listed?	Search for your firm using its name or tax ID. You may also skip the firm selection. If the firm selection is skipped, additional Ready to Sell checks won't be run for firm-specific requirements. We recommend always performing the Ready to Sell Lookup with a firm selected.
If the client's resident state is different from the state where the business is being solicited or signed, do I need to indicate that?	Yes. Some states have additional requirements when a client signs an application outside of their resident state. It's important to answer this question to ensure there isn't a delay in issuing the policy.
Can the Ready to Sell Lookup tool be used to check fee-based products in New York?	No. At this time, the Ready to Sell Lookup won't validate fee-based products in New York. A note on the Product selection page reminds you that this validation isn't currently available.
What if I want to look up information about someone else?	Financial professionals may only view their own RTS results and may not search for anyone else.
How quickly is information updated in the Ready to Sell Lookup tool?	Changes are reflected in the Ready to Sell tool about an hour after updates are made to Lincoln's system of record.
Does the Ready to Sell tool know what products I can sell through my firm?	No. Currently, the Ready to Sell tool doesn't manage product-selling group agreements. Please check with your firm's back office if you have questions about which products may be sold.
Does the Ready to Sell tool consider reciprocity for my NAIC annuity and long-term care state training requirements?	Yes. These rules are built into the platform to ensure you get an accurate result when checking whether you can sell a product.
Are there any additional resources regarding the tool?	<ul style="list-style-type: none"> • Article • Training Video

For Financial Firms

Subject to State and/or Agency/Firm Approval

Question	Answer
Who can access the Ready to Sell Lookup tool?	<p>Only firms who have set up BDFA or Principal access will see a Ready to Sell link.</p> <p>Financial professionals who are registered on Lincoln's producer website as a prospect will not have access to the tool. In addition, some firms have restrictions from using the tool.</p>
How do I access the Ready to Sell Lookup tool?	Log in to your LincolnFinancial.com profile. You'll find a link to the Ready to Sell Lookup on the landing page in the shortcut menu. There is also a link on the licensing and contracting page. If you don't see a link, work with your relationship manager to request that it be added to your page.

What if I get the message “Financial Professional not found” when searching the tool?	<p>This could mean one of four things:</p> <ol style="list-style-type: none"> 1. Your search criteria need to be updated because the inputs don’t match the data in Lincoln’s systems. 2. The financial professional hasn’t submitted a contracting request to Lincoln, has never sold a policy, and isn’t currently servicing any business. 3. The financial professional hasn’t submitted a contracting request to Lincoln, has never sold a policy, and/or isn’t currently servicing any business. 4. The financial professional isn’t actively affiliated with your firm on Lincoln’s systems.
Can I look up information on any financial professional?	No. You can only look up information about financial professionals for whom Lincoln shows an active relationship with your firm. If there isn’t an active relationship, the financial professional won’t be shown in your search results.
How quickly is information updated in the Ready to Sell tool?	Changes are reflected in the Ready to Sell tool about an hour after updates are made to Lincoln’s system of record.
Does the Ready to Sell Lookup tool know what products our firm offers?	No. Currently, the Ready to Sell tool doesn’t manage product-selling group agreements.
If our firm has a preferred product training vendor, could financial professionals be prompted to go to our preferred vendor's website?	Yes. If your firm uses a specific product training vendor for its products and your firm is selected, the financial professional NIGO messaging can reflect this vendor when product training requirements are NIGO.
Whom do I contact if I have questions about the information found in the Ready to Sell results?	Call the Lincoln Contact Center at 800-238-6252, for questions about Ready to Sell requirements.
Are there any additional resources regarding the tool?	<ul style="list-style-type: none"> • Article • Training Video

Contact your dedicated Lincoln team with additional questions.

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