

MoneyGuard Market Advantage® support after the sale

Post-issue policy management

We provide three tools to help you with your client reviews by making policy management easier



Automated in-force illustrations

Generated shortly after the policy anniversary, our illustrations can be found in the **book of business** tool on the Lincoln planner website and include:

- Current policy values
- As-is illustration assumptions

- Future policy changes
- Premiums paid



Policy change reminders*

These reminders will be sent to you and your client for the following illustrated changes:

- Premium changes
- Specified amount increases or decreases
- Loans, withdrawals and repayments

We will send a welcome letter to inform you and your client that we're tracking changes, identifying what is being tracked and when a notification will be sent. Prior to a planned change, we'll send you a reminder 75 days before the anniversary. Your client will receive a reminder 60 days prior to the anniversary.



Dedicated investment desk

Our team of licensed and credentialed specialists keeps current on global economic trends and has the knowledge and resources to help financial professionals make informed decisions about investment options within Lincoln's solutions. We can help with:

- Reviewing contract level and individual fund performance
- Performing investment portfolio analysis
- Discussing recent market events and their effect on investment results

*Policyowners can opt-out of this program.

Insurance products issued by:
The Lincoln National Life Insurance Company



For more information about post-issue policy management, contact your Lincoln *MoneyGuard*® representative.

Not a deposit

Not FDIC-insured

Not insured by any federal government agency

Not guaranteed by any bank or savings association

May go down in value

©2022 Lincoln National Corporation

LincolnFinancial.com

Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates.

Affiliates are separately responsible for their own financial and contractual obligations.

LCN-4783294-061022 PDF ADA 8/22 **Z03 Order code: MG-POST-FLI001**



MoneyGuard Market Advantage® policies are issued by The Lincoln National Life Insurance Company, Fort Wayne, IN, and distributed by Lincoln Financial Distributors, Inc., a broker-dealer. **The Lincoln National Life Insurance Company does not solicit business in the state of New York, nor is it authorized to do so.**

All guarantees and benefits of the insurance policy are subject to the claims-paying ability of the issuing insurance company. They are not backed by the broker-dealer and/or insurance agency selling the policy, or any affiliates of those entities other than the issuing company affiliates, and none makes any representations or guarantees regarding the claims-paying ability of the issuer.

Products, riders and features are subject to state availability. Limitations and exclusions may apply. Check state availability.

With variable products, policy values will fluctuate and are subject to market risk and to possible loss of principal.

Variable products are sold by prospectuses, which contain the investment objectives, risks, and charges and expenses of the variable product and its underlying investment options. Read carefully before investing.

For broker-dealer use only. Not for use with the public.