Get on board with *Lincoln TermAccel*®

How to get started with our fully electronic process

Selling *Lincoln TermAccel* is easy with our innovative, fast-to-approval processes.

It's simple

- Electronic ticket submissions
- No attending physician statements

It's fast

- Streamlined approval process with automated underwriting
- Lab-free process with real-time offer for qualifying clients

It's highly competitive

- Low premiums
- Highly competitive compensation

It's flexible

- Affordable protection for middle-market clients, ages 18 – 60
- Face amounts from $100,000 to $2,500,000
- 10-, 15-, 20- or 30-year terms

Get started in three simple steps

Step 1: Operational readiness

iPipeline customers

- Make sure *Lincoln TermAccel* is viewable in iService
- Access LifePipe™ for quoting
- iGO® for eTicket

OR

Non-iPipeline customers

- Access the Get a Quote tool on the *Lincoln TermAccel* product page of your Lincoln producer website
- To add a custom link to your agency website, contact your Lincoln Term Consultant

- Confirm DocuSign® or DocFast® for ePolicy delivery (required for *Lincoln TermAccel*)
- ePolicy delivery service is free for Lincoln policies
- DocuSign: No setup or registration required; request DocuSign ePolicy delivery at eTicket submission
- DocFast: Register for setup by contacting your dedicated Lincoln New Business team

Step 2: Training

- Access *Lincoln TermAccel* product and process training tools at LincolnFinancial.com/TermAccel
- Additional eCapability online training videos and supporting documents are available at LincolnFinancial/GoDigital

Step 3: Launch

- Use Lincoln marketing resources to help develop your agency's promotional plan
- Submit test cases to ensure operational readiness and training success
- Begin selling *Lincoln TermAccel*

Insurance products issued by:
The Lincoln National Life Insurance Company

Lincoln TermAccel process communication touchpoints

The *Lincoln TermAccel* process has been built with multiple communication touchpoints to help ensure a streamlined process. Use the reference guide below to understand when you can expect to receive **email correspondence** for each case submitted. Additionally, up-to-date pending case status is always available on your Lincoln producer website.

eTicket submission

Producer completes and submits the online ticket

Client: Solicitation signature request/producer receives confirmation once signed

Producer: Final submission signature request — producer signs and sends back to Lincoln

Producer and case contact: Policy number confirmation sent to producer and case contact (includes copy of signed solicitation paperwork)

Client interview

Policy is viewable on the pending website status tracker and client is contacted for the interview

Online interview

Client: Secure link is sent to begin the online interview; link is valid for 10 days

Case contact: Interview status is provided on the pending website and in automated email notifications

Phone interview

Client: Link is sent to schedule Tele-App interview online, or if it is not completed online, the Lincoln Tele-App team will call client to schedule

Case contact: Tele-App interview appointment confirmation with date/time of interview

Case contact: Notification if cancellation occurs or if unable to contact client after three attempts

Client: Tele-App interview appointment confirmation and reminders

Lab-free determination

Client's identification confirmed and query Rx, Dx, MVR and MIB

Lab-free

Case contact: Confirmation and notification that case has been quoted

Lincoln orders labs and vitals

Client: Vendor contacts client to schedule examiner appointment

Case contact: Examiner appointment confirmation from vendor with scheduled or rescheduled date, or cancellation of appointment

Case contact: Upon receipt and review of lab results, notification of underwriting decision is sent

Approval and ePolicy delivery

Underwriting complete — final decision

Case contact: Notification to review policy and OK for agent review

Producer: Notification to review, sign and send documents to client

Client: Notification to sign delivered documents

Case manager: Confirmation of fully signed delivery documents

Case manager: Lincoln confirms good order receipt

Refer to the *Lincoln TermAccel* FAQ flier for additional information.

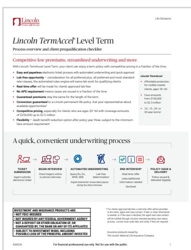
Additional email communications to case contact may include

- Other outstanding requirements needed for issue (e.g., replacement forms and policy information)
- Quote if case is approved other than applied for and seeking confirmation to proceed with issuing the policy
- Decline if client is not eligible for *Lincoln TermAccel* Level Term

Marketing resources

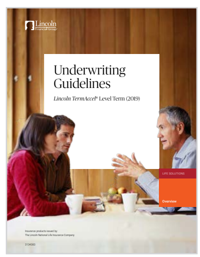
Financial professional resources

Process overview and prequalification checklist



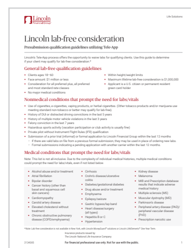
Order code: TO-PROC-FLI001

Lincoln TermAccel® underwriting guide



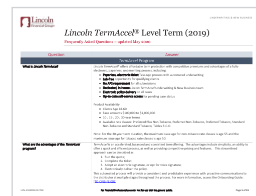
Order code: UW-GUIDE-BRC002

Lab-free opportunity flier



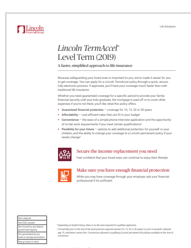
Order code: UW-NOLAB-FLI001

Lincoln TermAccel frequently asked questions



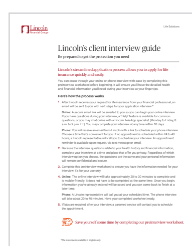
Client resources

Lincoln TermAccel client guide



Order code: TA-CLT-FLI003

Client interview prep guide



Order code: UW-PREP-FLI001

Dedicated *Lincoln TermAccel* case contacts

Communication specialists are in place to promptly respond to inquiries on your *Lincoln TermAccel* cases.

Amie Voss, Term Consultant
Email: Amie.Voss@LFD.com
Direct: 336-814-0275

Case management, new business processing and underwriting

Email: TermAccelUWNB@LFG.com
Toll-free: 844-815-6925

Tele-App
Email: TermAccelTeleAppTeam@LFG.com
Toll-free: 844-815-7582

For self-service on your pending cases, access up-to-date status and resolve outstanding requirements from your Lincoln Producer website.

Put *Lincoln TermAccel®* to work for you. Contact your Term Consultant for onboarding and training.

DocFast® is provided by iPipeline. iPipeline is not an affiliate of Lincoln Financial Group.

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

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-4269335-020322
POD ADA 6/22 **Z11**
Order code: TO-ONB-FLI001

Lincoln Financial Group®

Lincoln TermAccel® Level Term (2019) is issued on policy form TRM6069 and state variations 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.
Not available in New York. Check state availability.

For financial professional use only. Not for use with the public.