

Support after the sale

Post-issue policy management

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



1

Automated in-force illustrations

These are generated shortly after the policy anniversary and are available in the **book of business** tool on the Lincoln planner website. They include:

- Current policy values
- As is illustration assumptions
- Future policy changes
- Premiums paid



2

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
- Death benefit option changes
- Loans, withdrawals and repayments

At policy issue, we 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.



3

Enhanced IUL annual statements

Our **IUL annual statements** make it easier to view, understand and manage a Lincoln IUL policy. On a single page, your clients can see the value of their death benefit, the policy value and what the policy earned in the last year.

Other highlights include:



A visual representation of the indexed account performance since issue and for each of the past five years



A "Did you know?" explanation of index crediting specific to the first year of the policy



Reminder of the power of a guaranteed 1% minimum floor



Future policy change reminders to help your clients meet their goals



Easy to understand explanations of key calculations



Separate segment maturity notices to show how much index crediting the policy received for the last year

Insurance products issued by:
The Lincoln National Life
Insurance Company

Lincoln Life & Annuity
Company of New York

For more information about post-issue policy management, contact your Lincoln 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

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LCN-1970068-121217
PDF 2/18 Z01
Order code: IUL-PIPM-FLI001



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