



The Lincoln National Life Insurance Company  
One Granite Place  
PO Box 515  
Concord, NH 03302-0515

July 18, 2018

Dear Manager,

Thank you for contacting Lincoln Financial Group.

In response to your request, we have completed the setup for **SAMUEL FLEISCHMAN**, (xxx-xx-5727), subject to the completion of our standard Due Diligence process. We will notify you if the process reveals any information which would affect contracting status.

Please include the following insurance producer code on new business applications to ensure timely underwriting and commission processing.

- Effective Date: 06/08/2018
- New Business Code(s): 2620407
- Producer Id: 0000455212

To ensure compliance with any state solicitation regulations, it is important that no business be solicited before the appointment effective date. Newly requested state appointments are listed below:

<u>State(s)</u>	<u>Appointment Effective Date</u>
NJ/MI	07/02/2018

Listed below is state specific information pertaining to the authorization for the producer to sell Lincoln Financial Group Long Term Care products.

<u>State(s)</u>	
NJ / MI	We were unable to authorize the producer due to the following: Doesn't meet state specific LTC training requirement

Listed below is state specific information pertaining to the authorization for the producer to sell Fixed and Fixed Indexed Annuity products.

<u>State(s)</u>	
NJ / MI	We were unable to authorize the producer due to the following: Must complete state general annuity training requirements

*Registered Representative of Lincoln Financial Distributors, Inc., a broker/dealer. Insurance products are issued by Lincoln affiliates. Principal office located at 130 N. Radnor-Chester Rd., Radnor, PA 19087-5221. Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates. [www.LincolnFinancial.com](http://www.LincolnFinancial.com)*



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We were unable to authorize the producer due to the following: Must complete Lincoln product specific annuity training requirements

Lincoln Financial Group is your dedicated partner to help provide the support you need so you can focus on what matters most, your clients. If you have questions please call us at 800-238-6252, opt 1, and we will be happy to assist you. Our Customer Care Representatives are available Monday through Friday between the hours of 8:00 a.m. and 6:00 p.m. (EST).

For additional information about Lincoln Financial Group, visit our website at [www.LincolnFinancial.com](http://www.LincolnFinancial.com).

Sincerely,

Elizabeth Lafontaine  
Manager  
Producer Solutions Operations

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LCN-1248676-071315  
The Lincoln National Life Insurance Company is domiciled in Fort Wayne, IN.

# Welcome to Lincoln Financial Group

We are pleased that you have chosen to associate with Lincoln Financial Group and its affiliates. The instructions, information and forms on the following pages are designed to make the process of contracting and appointment a smooth and expeditious experience.

Lincoln Financial Group is focused on offering superior service to producers. To avoid an unnecessary delay in processing, please be certain that all items on the checklist below have been completed and submitted.

Contracting and Appointments received from producers residing in "Just in Time" (immediate appointment) states will be processed upon receipt of first New Business application.

Contracting and Appointments received from producers residing in "Pre-Appointment" states are processed immediately. (Producers may solicit upon receipt of appointment approval.)

## Instructions for completing Required forms

### PRODUCER COMPLETES:

- 1. **Professional Profile (LA02296)** Completed and signed by producer. An explanation for any yes answer must also be signed and dated by producer. If contracting as an organization, the organizations tax id must be included.
- 2. **Fair Credit Reporting Act Disclosure & Authorization (LA02298)** Must be signed and dated by producer.
- 3. **Producer Agreement (BJ-02300)** Must be signed and dated by producer or principal of organization if contracting as an organization.
- 4. **Business Associate Agreement (PS10515)**
- 5. **FastCash Electronic Funds Transfer (EFT) Authorization (GB02303)** complete and attach a voided check for EFT deposit.
- 6. **AML certification (LA06554)** Proof of AML training required at time of contracting; continuing every 24 months.
- 7. **W9** Must be submitted if contracting as an organization. <http://www.irs.gov/pub/irs-pdf/fw9.pdf>
- 8. **E & O Coverage** Please attach declaration page naming producer or agency being contracted. E & O declaration page must be current and for a minimum of \$1,000,000.00
- 9. **New Business Producer appointments will be filed upon submission of 1st application, except in pre appointment states.**
- 10. **General Annuity and Product-Specific Training Requirements**  
<http://naic.pinpointglobal.com/LincolnFinancial/Apps/default.aspx>
- 11. Long Term Care Continuing Education Requirements can be located on LFD.com.  
After login Select the Conducting Business Tab; Contracting & Appointments section.

### MANAGER COMPLETES:

- 12. **CompBuilder (PS011685)** Hierarchy and commission information must be completed for all products requested.

### Optional Form:

- 13. **Financial Owner Assignment (BJ-02305)** Completed, signed and dated by producer. Assignee must be currently appointed with Lincoln.

- Submit completed contracting to (please select by e method of submission):

Email to [contracting@lfg.com](mailto:contracting@lfg.com)

**OR** Fax to 603-226-5311

**OR** mail to:

Lincoln Financial Group  
Producer Solutions Operations – 2S30  
PO Box 515  
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