

E-communication from Lincoln Financial Group

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Point-of-sale forms update

Important reminder: Several forms that were previously included in the Lincoln *MoneyGuard*[®] Reserve delivery package are now required at the point of sale and must be submitted with the ticket via your standard process.

For tickets submitted on or after March 25, 2011, the following forms must be signed by the owner and the agent, and submitted along with the ticket and other required forms at point of sale in all states:

-LTC Personal Worksheet (Form 33498 and state variations)

-Replacement of Life Insurance or Annuities (Form LF10087 and state variations) **Note: This form is required even if you are not replacing an existing insurance policy.**

CA Submissions: In addition to the above referenced forms, the following forms must be signed by the owner and the agent and submitted along with the ticket and other required forms at point of sale:

-Lincoln *MoneyGuard* Reserve Application Checklist (Form MG10086)

-Financial Disclosure for CA Residents Age 65 and Over (Form LF10088)

The LTC Personal Worksheet is available in the required Point-of-Sale Forms section through the Lincoln online forms tool and also under the Additional Reports section in the *Lincoln DesignIt*SM Platform illustration software. All other forms will be available in the required Point-of-Sale Forms section through the Lincoln online forms tool by March 4, 2011. iPipeline will also be updated with these forms. It is important that they be submitted with all incoming new business.

If you have any questions, please contact your Lincoln *MoneyGuard* Internal Sales representative. If you are with an MGA, please contact 877 533-0114. All others please call 877 546-2647.



Lincoln *MoneyGuard*[®] Reserve universal life policies are issued by The Lincoln National Life Insurance Company, Fort Wayne, IN, on Policy Form LN850 (8/05) with a Convalescent Care Benefits Rider (CCBR) on Rider Form LR851 (8/05).

The Lincoln National Life Insurance Company does not solicit business in the state of New York, nor is it authorized to do so. Policies sold in New York are issued by Lincoln Life & Annuity Company of New York, Syracuse, NY, on Policy Form LN850 (8/05) with a Convalescent Care Benefits Rider on Rider Form LR851 (8/05).

All guarantees and benefits of the insurance policy are backed by 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 and features, including benefits, exclusions, limitations, terms, and definitions, may vary by state.

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