

Simplify the management of your business

Thank you for your interest in Lincoln Financial Group. We look forward to helping you learn more about our suite of commission-free annuity solutions designed specifically for RIAs.

Getting started: Investment Advisor Setup form

Before opening your first account with us, please complete and return the **Investment Advisor Setup form**. This gives you online account access and the ability to receive automated data feeds through DST FAN Mail.

Creating your online account with *Lincoln AppAdvantage*[®]

Lincoln AppAdvantage is an e-application for digital account creation with e-signature capabilities.

After accessing the tool, use the “Open” dropdown link to navigate through the application. You can jump to a specific section or use the arrows to move to the next page. The red indicator at the top of the page will alert you to any information needed.

Once all required sections are completed, your client will sign electronically; this can be done either in person or through email. Note: Some forms may require a wet signature.

Linking your annuity account to key RIA custodians

Add your client’s Pershing or TradePMR account number to your application on *Lincoln AppAdvantage* to receive direct feeds of account data.

DST FAN Mail[®] is a valuable resource for managing your account online

- Automated daily feeds of customer account data, financial activity and holdings
- Compatible with most portfolio management programs and platforms
- Enables you to manage annuities within a client’s overall portfolio

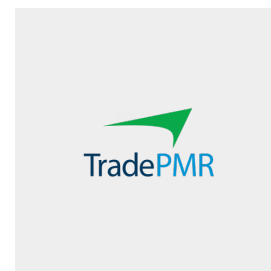
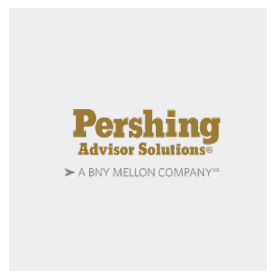
New users: One-time setup with DST FAN Mail

Go to www.dstfanmail.com and select **Enroll in FAN Mail**.

1. At Service Level screen, choose **Representative Level**.
2. At B-D Selection, choose **Registered Investment Advisor**.
3. At Registration Information, complete advisor information (address, contact, type of software used, create DST password, etc.).
4. Add security questions to reset your password.
Skip step 5
6. Add variable annuities from Lincoln Financial Group. (Required information: a contract number and RIA’s Social Security number).
Skip steps 7 – 9
10. Verify above information and click **Submit**.
11. After enrolling, send your DST FAN Mail user ID to B2BCommerce@LFG.com for daily feeds.

Existing users: Setup with DST FAN Mail

Within DST FAN Mail, select **Add Variable Annuities** from **Lincoln Financial Group** and send your DST FAN Mail user ID to B2BCommerce@LFG.com for daily feeds.



Register with LincolnRIA.com

1. Go to **LincolnRIA.com**.
2. Select **Register Now**.
3. Complete the brief online application.
4. You'll now have access to **LincolnRIA.com**.

Start *Lincoln AppAdvantage*[®]

1. Log in to **LincolnRIA.com**.
2. Select **Tools** from the menu.
3. Select **Get Started** on *Lincoln AppAdvantage* page.
4. Select **New Application**.

Access your account management portal

1. Log in to **LincolnRIA.com**.
2. You'll now have access to statements, tax forms and accounts. You can view fund performance, change allocations and see details of benefits and values.



For more information, contact your Lincoln regional consultant, call 877-533-5630 or visit LincolnRIA.com.

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