

Policy Prints Temporarily Suspended

June 2020 Update

As we previously communicated, Lincoln implemented a mandatory work-from-home policy for employees, including the Underwriting & New Business (UW&NB) team. Protecting the health and welfare of our employees is among our top priorities, and all UW&NB employees continue to operate from a remote work environment.

While Lincoln employees continue to work remotely, we are unable to print and assemble life insurance policies from our home office location. Therefore, traditional paper policy packages are unavailable until further notice.

What you need to know

- **Electronic policy delivery (ePolicy Delivery) and digital PDF policy delivery options are available and must be leveraged for policy delivery during this time when paper policies are unavailable.**
- If you previously requested to receive a duplicate paper copy of your placed policy at a later date, Lincoln is working with a secure remote printing vendor to provide you with a printed copy of the policy PDF. This policy print will not be bound or assembled.
- Until our offices re-open and normal business operations resume, if you would like to receive a duplicate paper copy of your placed policy, please contact your dedicated Lincoln Underwriting Account Executive (UAE). Lincoln will work with a secure remote printing vendor to provide you with a printed copy of the placed policy PDF to retain for your records. This policy print will not be bound or assembled (subject to firm approval, if applicable; not available for *Lincoln TermAccel*®).

ePolicy delivery

Electronic policy delivery offers secure online review of your policy and enables electronic signing for the agent and client from a computer or mobile device. After all signing parties have completed the process, the policy is immediately available for download. Not available for Lincoln *MoneyGuard* in New York. Subject to firm approval.

1. **DocFast via iPipeline:** Available for all Lincoln life insurance products, including Lincoln *MoneyGuard*, at no cost. Getting started:
 - Contact your Underwriting & New Business team and register for DocFast through iPipeline: LincolnFinancial.com/eDelivery
 - iPipeline subscription is not required for Lincoln products
 - Initial set-up may take up to two weeks, and an acknowledgement agreement is required
 - Indicate **DocFast ePolicy delivery** as the method on the cover letter or email at submission
 - Agent FAQ [[DOWNLOAD](#)]
2. **Lincoln Direct DocuSign eDelivery:** Available for *Lincoln LifeElements* Term, UL, IUL, VUL products, and Lincoln *MoneyGuard*, at no cost.
 - No set-up or registration required
 - Indicate **DocuSign ePolicy delivery** as the method on the cover letter or email at submission
 - Policy is electronically sent directly to the agent for signing, then to the client for signing
 - Agent FAQ [[DOWNLOAD](#)]

Digital PDF policy delivery

Lincoln generates and provides a PDF of all issued life insurance policies, excluding *Lincoln TermAccel*[®]. This PDF is acceptable for policy delivery to your client.

Access the policy PDF two ways:

- Lincoln producer pending website:** Download up to five policies at one time from the pending list
 - Self-service policy PDF access [[DOWNLOAD](#)]
- Request secure email from Lincoln New Business Associate:** If you do not have access to Lincoln's producer pending website, you can request a policy PDF on the cover letter, or you may contact your Lincoln New Business Associate

Policy PDF delivery notice options:

- Wet signature:** Scan and email or fax a copy of the signed policy back to Lincoln
 - Photo images of forms are acceptable. Photos must be clear, legible and reflect the complete page, including the form number and date. All pages of a form must be submitted.
- DocuSign:** If a DocuSign eSignature agreement with Lincoln is in place, the delivery notice can be loaded into the Agency's DocuSign account to obtain an electronic signature from the client (not available for Lincoln *MoneyGuard* in New York).

Resources

The screenshot shows a document titled "Lincoln Life Policy Delivery Options" with a table of delivery methods. The table has columns for "Product", "Delivery Method", "Availability", and "Notes".

Product	Delivery Method	Availability	Notes
Lincoln Life Insurance Company	Electronic Policy Delivery (PDF)	Available for all Lincoln Life Insurance Company products.	Temporarily unavailable for policy issued on or after 3/23/20 on Friday, March 27, 2020.
Lincoln Life Insurance Company	Traditional Paper Policy Prints	Temporarily unavailable for policy issued on or after 3/23/20 on Friday, March 27, 2020.	

[Policy Delivery Options](#)

The screenshot shows a document titled "Policy Delivery" with a "NOTICE: Traditional Paper Policy Prints Temporarily Unavailable" section. It includes a table of delivery options and a "Digital Policy Delivery Options" section.

NOTICE: Traditional Paper Policy Prints Temporarily Unavailable
All Underwriting and New Business employees are operating under a mandatory work-from-home guidance and therefore we will not be printing life insurance policies from our office for an undetermined amount of time.

What you need to know

- For policies issued on or after 3/23/20 on Friday, March 27, 2020, traditional paper policy prints will be unavailable for all life insurance products, including Lincoln *MoneyGuard* solutions.
- Electronic policy delivery (Policy Delivery and PDF policy delivery options) will remain available and must be leveraged for policy delivery during this time when paper policies are unavailable.
- Prints could still be ordered to duplicate printed paper policy after offices resume and normal business operations resume. Please verify your Lincoln New Business Associate (subject to firm approval), if applicable, and not available for Lincoln *TermAccel*.
- Policy Print Notice Communication (202003202)

Digital Policy Delivery Options
The following options will be available for policy delivery of life insurance and Lincoln *MoneyGuard* policies and must be leveraged beginning for policies issued after 3/23/20 on Friday, March 27, 2020.

- Electronic Policy Delivery (Policy Delivery)
- Digital Policy PDF Delivery

Contact your dedicated Lincoln Underwriting and New Business team with any questions.
PLEASE NOTE: All digital policy delivery options are subject to Agency, Firm and/or state availability.

[Policy Delivery Guide](#)

Please contact your dedicated Lincoln Underwriting & New Business Team with questions.

Life insurance issued by The Lincoln National Life Insurance Company, Fort Wayne, IN and Lincoln Life & Annuity Company of New York, Syracuse, NY, and distributed by Lincoln Financial Distributors, Inc., a broker-dealer. Contractual obligations are backed by the claims-paying ability of the issuing insurance company. The Lincoln National Life Insurance Company does not solicit business in the state of New York, nor is it authorized to do so. Lincoln Financial Group is the marketing name of Lincoln National Corporation and its affiliates.