

LincXpress® Tele-App eTicket Expansion to VUL

Effective November 11, 2019

Lincoln is pleased to expand the *LincXpress*® Tele-App eTicket submission process to now include **variable universal life insurance (VUL/SVUL) products**.

This expansion will offer the same electronic experience as the fixed life insurance product portfolio, while maintaining consistency with the current paper process. It will continue to improve:

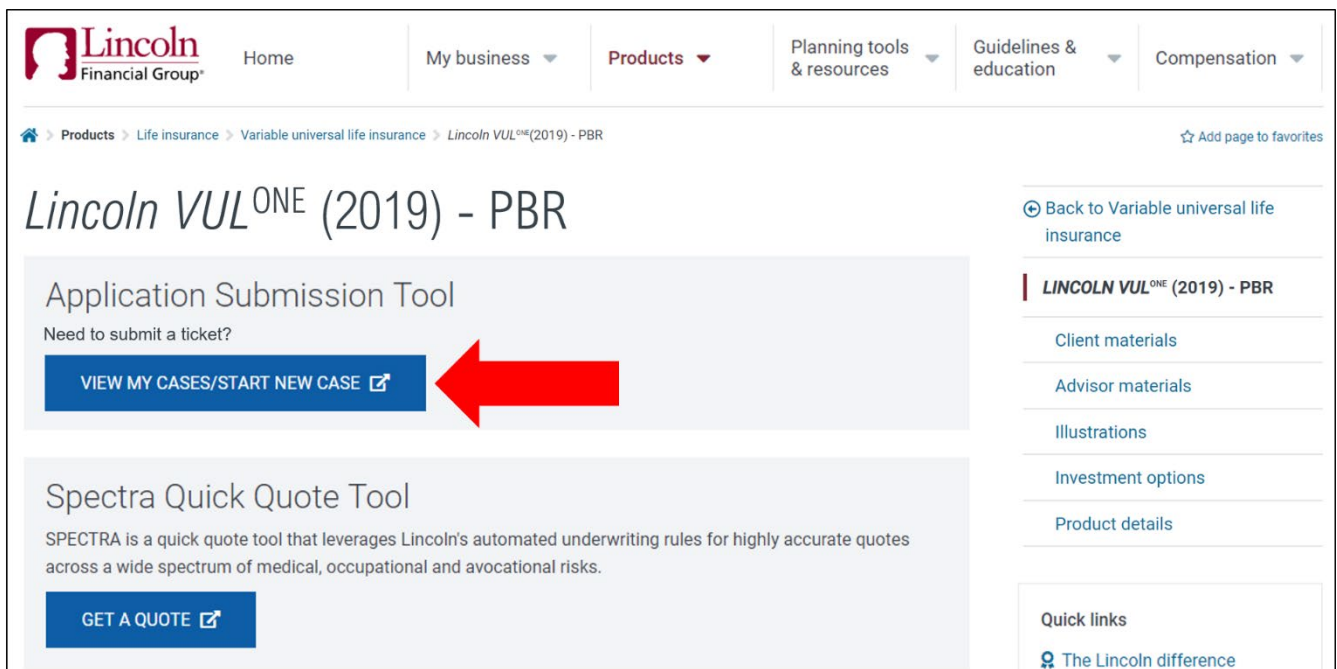
- the ease of doing business for our producers and consumers,
- further reduce turnaround times,
- reduce NIGOs, and
- enable faster policy issue.

Prior to submission, please confirm with your broker-dealer that this process is an approved form of submission and observe any back-office suitability requirements and firm-specific form requirements.

How to Access

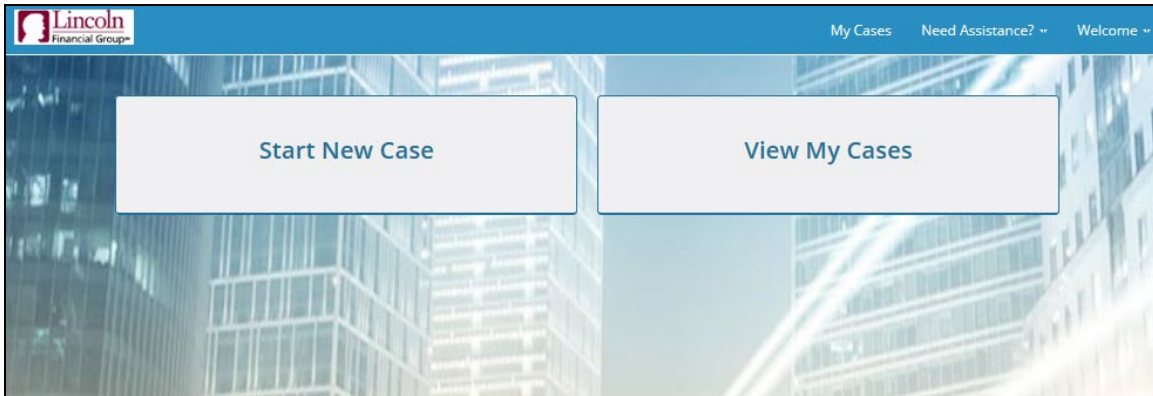
You have two options to access the *LincXpress* Tele-App eTicket submission tool, as you do with fixed products today:

1. **Log into your Lincoln Producer Website** – From the variable universal life insurance product pages, click **“View My Cases/Start New Case”**




The screenshot shows the Lincoln Financial Group website interface. At the top, there is a navigation bar with the Lincoln logo and several menu items: Home, My business, Products, Planning tools & resources, Guidelines & education, and Compensation. Below the navigation bar, there is a breadcrumb trail: Products > Life insurance > Variable universal life insurance > Lincoln VUL ONE (2019) - PBR. The main content area features the heading "Lincoln VUL ONE (2019) - PBR" and two tool sections. The first section is "Application Submission Tool" with the text "Need to submit a ticket?" and a blue button labeled "VIEW MY CASES/START NEW CASE" with an external link icon. A large red arrow points to this button. The second section is "Spectra Quick Quote Tool" with a description of the tool and a blue button labeled "GET A QUOTE" with an external link icon. On the right side of the page, there is a sidebar with a "Back to Variable universal life insurance" link, a section for "LINCOLN VUL ONE (2019) - PBR" containing links for Client materials, Advisor materials, Illustrations, Investment options, and Product details, and a "Quick links" section with a link for "The Lincoln difference".




2. Log in to your iPipeline account – Select “Start New Case”



Carrier and Product

State: Product Type: 

Product

Carrier▲	Product	iGO
	Lincoln AssetEdge VUL 2019 (eTicket-LincXpress)	<input type="button" value="Select"/> <small>e-Sign</small>
	Lincoln VULONE 2019 (eTicket-LincXpress)	<input type="button" value="Select"/> <small>e-Sign</small>
	Lincoln SVULONE 2019 (eTicket-LincXpress)	<input type="button" value="Select"/> <small>e-Sign</small>

Uploading Additional Documents

For **variable life insurance** products, you can upload any VUL specific documents in the **'Additional Information'** section and the attachment(s) will accompany the packet that is sent to Lincoln. Attachments must be in PDF format, and may include the following:

- Customer Identity Verification Form
- VUL Allocations Form
- VUL Product Illustration
- and, more...

The screenshot displays the Lincoln Financial Group application interface. The top navigation bar includes the Lincoln logo, 'My Cases', 'Need Assistance?', and 'Welcome'. The user is logged in as 'Client, Valued' for 'Lincoln National Life Insurance Company'. The current case is 'Lincoln VULone 2019 (eTicket-LincXpress)'. The interface shows two tabs: 'Case Information' and 'Application'. The left sidebar contains a list of sections: 'Insured Information', 'Temporary Life Insuranc...', 'Existing Insurance', 'Suitability Review', 'Agent Information', 'Agent Information Contd', 'Additional Information' (highlighted with a red arrow), and 'Validate and Lock'. The main content area is titled 'Additional Information' and contains the text: 'You may attach any of the documents below. Attachments must be in PDF format. Please note Attachments will not be e-signed.' Below this text is a section titled 'VUL Forms' with a list of document types to be attached: 'Customer Identity Verification form', 'Legal Entity Verification documents', 'VUL Allocation form', 'Internal VUL to VUL Exchange (list form name and number)', 'Attach Illustration/Quote', 'Voided Check (N/A)', 'Attach Additional Financial Information', 'Attach Trust Information', and 'Attach Miscellaneous (cover letter, labslips, etc.)'. At the bottom of this list are 'Back' and 'Next' navigation buttons.

Resources

LincXpress® Agent Overview Guide

Order code: [UW-LX-FLI001](#)

LincXpress® Agent FAQ

[\[VIEW\]](#)

Lincoln Application Submission Comparison Summary

Order code: [UW-APP-FLI001](#)

iPipeline® Users – Adding a New Product to iGo

Having trouble finding the new VUL products in your iPipeline Account? As a reminder, when new life insurance products become available, iPipeline® users must add any new products to their account within iGO and iService. If you have specific questions or need instructions, you can access additional information from the iPipeline Customer Portal: <https://www.customerportal.ipipeline.com/kb/iservice/>.

IPipeline®
CUSTOMER PORTAL

PRODUCTS RESOURCES COLLABORATE SUPPORT LOG IN REGISTER

iService

Home / Knowledge Base / iService /

Q Search product resources **SEARCH**

Trending searches: LifePipe Upgrade, Carriers Installed with iGO, Connections 2018

Forms Configuration

- Configure Your Forms Engine
- Customize the Look of Your Forms Engine
- Add Forms in FormsPipe
- Customize Forms Search Options
- Add Service Types in FormsPipe
- Add Packaging Options to Your Forms Engine

iGO Configuration

- Configure iGO within iService
- Add Products to iGO**
- Update an Agent's Case Manager

[View All 3](#) →

iService Getting Started

Life insurance issued by The Lincoln National Life Insurance Company, Fort Wayne, IN 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. Only Registered Representatives can sell variable products. LincXpress Tele-App is not available in New York.