

LIFE SOLUTIONS

New Paperless Options for Life Insurance Clients

Thank you for helping Lincoln customers go paperless and utilize our secure, digital delivery options!

Individual life insurance policy owners with a registered Lincoln online account have new options for managing and receiving important information.

Previously, policy owners only had the option to electronically deliver limited documents and communications. Paperless options have been expanded to include billing notifications, confirmations, letters, payment notifications, and statements!

The best part? A new Global Toggle that allows policy owners to opt into paperless delivery for ALL documents.





Go paperless for all documents @



What You Need To Know

- If the Global Toggle is turned on prior to November 22, 2025, all settings will carry over.
- Individual preferences set prior to November 22, 2025, will carry over. Users will need to manually set delivery preferences for the new documents available (or use the Global Toggle to switch all to paperless).
- Note: Due to legal requirements, the Global Toggle excludes tax statements. Clients must actively opt-in to paperless delivery of these documents.

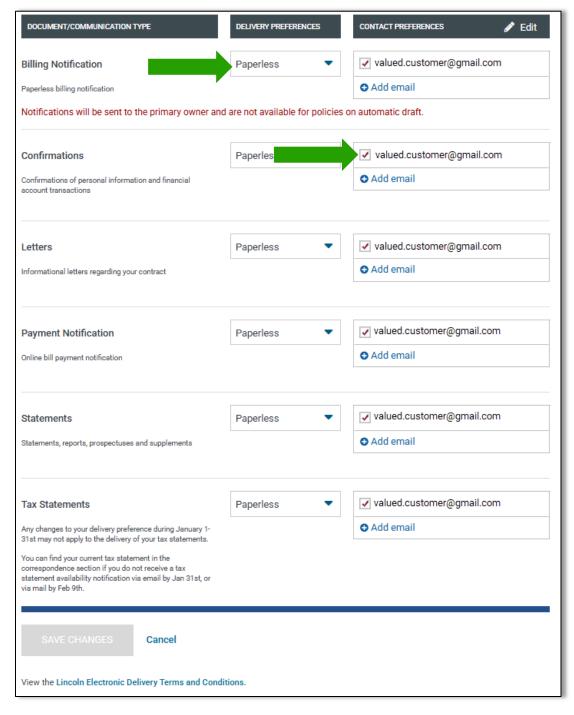
Please share this communication preferences guide with your life insurance clients to encourage them to switch to paperless email notifications and secure, 24/7 access to their documents!

How It Works

- 1. To opt-in to go paperless, customers must register for a Lincoln online account or log into their online account at LincolnFinancial.com.
- 1. Once logged in, click the Welcome Menu in the top left corner and select Communication Preferences.
- 2. At the top, there is an option for the customer to toggle on to "Go paperless for all documents," should they choose to do so, keep reading.

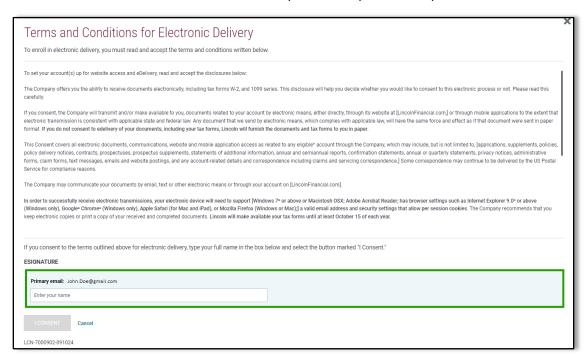


- 3. To select individual preferences, select **Paperless** from the **Delivery Preferences** dropdown menu next to each **Document/Communication** type.
 - a. Note: Mail is the default setting.
- 4. Under **Contact Preferences**, the customer will use the **checkbox** to set which email address(es) notifications will be sent to.
 - a. If an email address is not listed, add one by clicking the **Edit** button at the top. In addition to the customer's registered user email, two additional email addresses may be added (three total).



5. Click the **Save Changes** button at the bottom.

- 6. At this time, the customer must provide **eConsent** by entering their name.
 - a. Note: Customers in California have a special 2-step eConsent process.



7. A green confirmation message box will pop up saying the changes were successfully made.

Frequently Asked Questions

1. What happens if a customer doesn't opt-in to be notified via email?

They will continue to receive their notifications via mail.

2. How many email addresses can be added to receive email notifications?

In addition to the customer's registered user email, two additional email addresses may be added (three total).

2. Will Financial Professionals receive a copy of the email sent to the client?

No, email notifications are sent only to the client. Financial Professionals can access client notification information by logging into their online LincolnFinancial.com account > My business > Correspondence & statements.

Can Financial Professionals opt-in to paperless preferences on behalf of their client?
Financial Professionals cannot opt-in on behalf of a client.

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