

Online Producer Contracting

Financial Professional onboarding made easy

Lincoln is proud to offer online producer contracting, making it faster and easier than paper to onboard life insurance and annuity Financial Professionals! Paperless contracting creates a positive customer experience and allows our Financial Professionals and distribution partners to:

- ✓ Reduce the time and effort required to submit an onboarding request
- ✓ Streamline the onboarding request process and avoid the hassle of mailing, faxing, or emailing completed forms to Lincoln
- ✓ Improve operational efficiency by reducing delays caused by incomplete requests or invalid submissions

[Click here to learn more!](#)

Individual Annuity Contact Center: Holiday hours

The Lincoln Individual Annuities Customer Contact Center (for financial professionals and clients) will observe the upcoming holiday hours:

- Thanksgiving Day: November 28th – closed
- Day after Thanksgiving: November 29th – OPEN, 8:00 am – 1:00 pm ET
- Christmas Day: December 25th – closed

2024 year-end business cut-off dates for Lincoln individual annuities

Listed below are some important cut-off dates to remember regarding year-end processing of 2024 Good Order business. Please keep in mind that transactions processed after the deadline will be completed on a best-efforts basis with no guarantees as to the tax year in which they will be reported. Dates below do not represent 2024 compensation payout.

Request or Process	Business Deadline Date	Contact Number
Individual Fixed, Fixed Indexed and Income Annuity New Business:¹		
1. Apps with money 2. Apps without money 3. Apps with internal transfers 4. Ongoing Remittances/ Deposits	December 20, 2024	Contact the appropriate New Business Case Coordinator
Financial Distributions:¹		
Withdrawal, internal transfer, surrender, loan, one-time RMD	December 20, 2024 <i>Note: "In good order" requests received on or before 12/20/24 will ensure 2024 tax reporting.</i>	Contact the appropriate product line Call Center
Automatic Withdrawal Service (AWS) for RMD ¹	December 1, 2024 <i>Note: "In good order" requests received on or before 12/1/24 will ensure 2024 tax reporting.</i>	Contact the appropriate product line Call Center

¹ All annuity business mail (applications, checks, financial requests, etc.) must be received in good order in the appropriate location by market close.