



# Lincoln *MoneyGuard*<sup>®</sup> Reserve

## How to schedule a point of sale personal history interview

**In order to streamline the process, Lincoln now offers the ability to schedule your client's phone interview at point of sale. Follow these easy steps to complete the scheduling process.**

- Contact the Customer Service department at 800 544-4326 between 8 a.m. and 10 p.m. Monday through Thursday, and 8 a.m. to 8 p.m. Friday ET.
- Tell the Customer Service representative who you are and that you are calling on behalf of your Lincoln Financial applicant to schedule a phone interview.
- At the time of scheduling, you will be asked to provide the following information:
  1. Client's SSN
  2. Client's name, including, first, last, and middle initial
  3. Client's full address
  4. Client's daytime phone number
  5. Client's evening phone number
  6. Your name, including first and last
  7. Your phone number
  8. Your agent ID # (SSN)
  9. Client's date of birth
  10. Client's gender
  11. Whether the spouse is applying (Allows Lincoln to link these files during the process.)
  12. Product type—Lincoln *MoneyGuard* Reserve
  13. Contract state
- Please be prepared to provide Customer Service any special handling that we might need to know in advance, such as a client's hearing impairment.
- Upon completion of information entry, you will be provided a reference number that should be written at the top of the Lincoln *MoneyGuard* Reserve ticket prior to submitting to Lincoln.
- You will be asked to provide a date and time that your client would like to complete their interview. Please have some alternative dates and times to insure availability of a time that is convenient for your client.
- Once the personal history interview is scheduled, submit the Lincoln *MoneyGuard* Reserve paperwork through your normal submission process.
- When the information is received by Lincoln, you will be notified if anything is not in good order. **Please note:** The underwriting decision will not be communicated until paperwork is received by Lincoln in good order and agent validation and licensing has been completed.
- **Please note:** Point of sale scheduling is not available for clients who will need an interpreter assisted interview or for face to face Interviews.

Products issued by:

The Lincoln National Life Insurance Company  
Lincoln Life & Annuity Company of New York

**For agent or broker use only. Not for use with the public.**

## Hello future.®

Not a deposit
Not FDIC-insured
Not insured by any federal government agency
Not guaranteed by any bank or savings association
May go down in value

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LCN1011-2048061  
POD 11/10 Z02  
Order code: MGR-PHI-FLI001  
10-5147A



Lincoln *MoneyGuard*® Reserve is a universal life insurance policy with a rider that accelerates the specified amount of death benefit to pay for covered long-term care expenses. The cost of riders will be deducted from the policy value. **All guarantees and benefits of the insurance policy are backed by the claims-paying ability of the issuing insurance company. They are not backed by the broker/dealer and/or insurance agency selling the policy, or any affiliates of those entities other than the issuing company affiliates, and none makes any representations or guarantees regarding the claims-paying ability of the issuer.** The insurance policy and riders have limitations, exclusions, and/or reductions.

Lincoln *MoneyGuard*® Reserve is issued by The Lincoln National Life Insurance Company, Fort Wayne, IN, on Policy Form LN850 (8/05) with a Convalescent Care Benefits Rider (CCBR) on Rider Form LR851 (8/05). **The Lincoln National Life Insurance**

**Company does not solicit business in the state of New York, nor is it authorized to do so. Contractual obligations are backed by the claims-paying ability of The Lincoln National Life Insurance Company.**

Policies sold in New York are issued by Lincoln Life & Annuity Company of New York, Syracuse, NY, on Policy Form LN850 (8/05) with a Convalescent Care Benefits Rider on Rider Form LR851 (8/05). **Contractual obligations are backed by the claims-paying ability of Lincoln Life & Annuity Company of New York.**

Products and features, including benefits, exclusions, limitations, terms, and definitions, may vary by state.

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