Delegate access to LFD.com

Allows authorized users to view financial professional's web experience

Step-by-step instructions to set up permissions

Here's how it works:

The "Delegator," aka producer, financial professional, firm level user or principal, logs on to LFD.com and specifies the individual who requires access, aka the "Delegate." That individual is sent a link to complete the registration process. After the registration is confirmed, the Delegate will be able to see what the Delegator has allowed.

To delegate access, follow the few short steps below, and if you require assistance during the process, please contact LFD Support at 877-533-1022, or Webmaster@lfd.com.

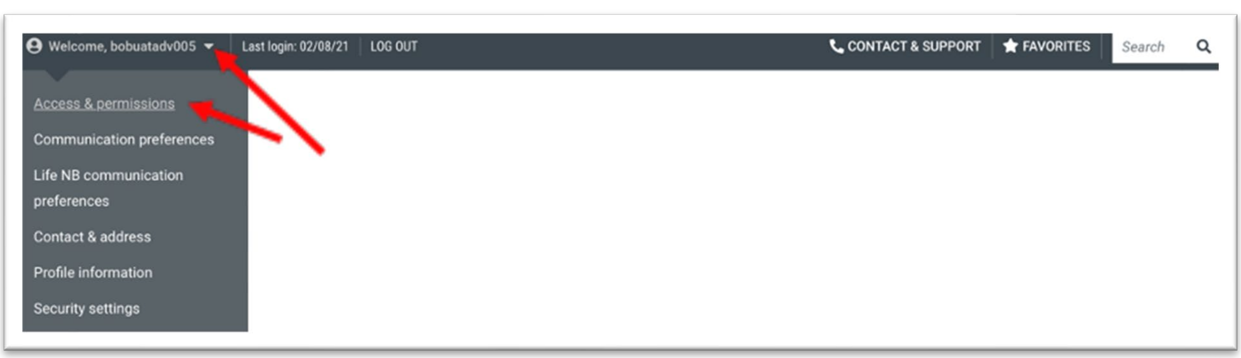
What will I need to setup delegation?

Delegator – (Completes Steps 1 & 2)	Delegate – (Completes Steps 3, 4 & 5)
• Lincoln login credentials • Name and email address of Delegate	• Delegation email (generated after steps 1 & 2 are completed) • Delegation Code (included in Delegation email) • Producer email address on the account being Delegated • One of the following: Producer ID, agent number, annuity contract number or life policy number

Delegator completes steps 1 and 2

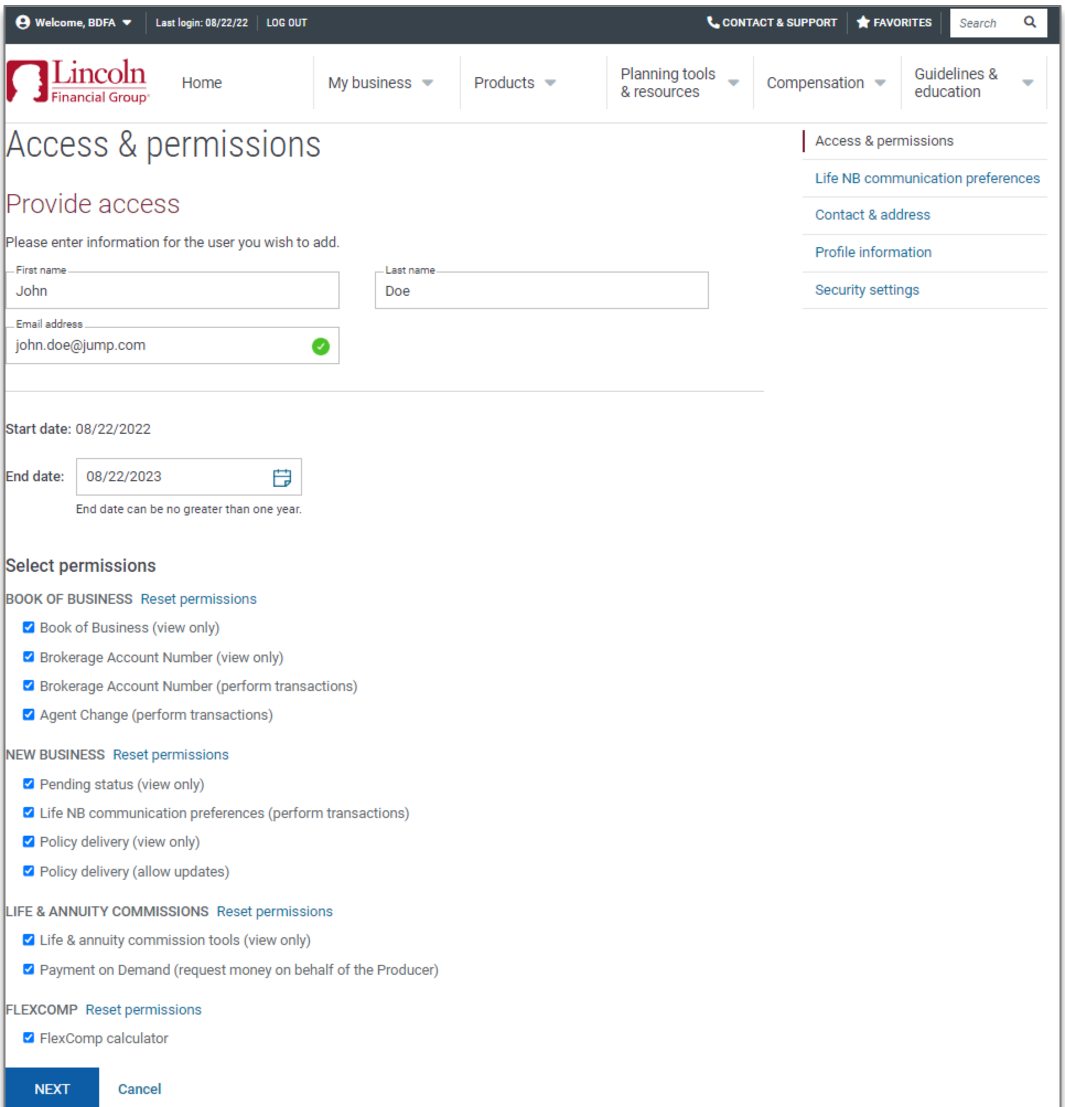
Step 1 (Delegator):

From LFD.com, visit "ACCESS & PERMISSIONS" under "Welcome, [your name]."



Step 2 (Delegator):

Click ‘Provide Access,’ and enter the Delegate’s first and last name, email address and end date for permissions. Start date will prefill as current day.



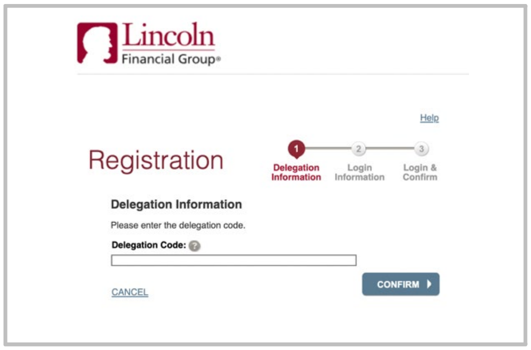
Then use the check boxes to indicate the delegate’s permissions, including the ability to view, transact or both. Click NEXT for final review of the permissions, and accept the privacy agreement. Then click SUBMIT.

*Note: Delegation is not an option for all products or programs. Contact your account manager to set up assistant access for these products and programs.

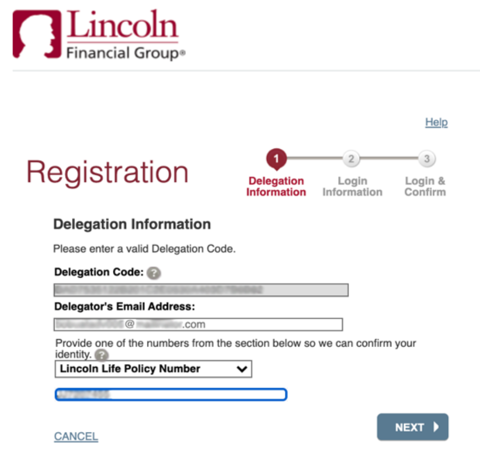
Delegate completes steps 3, 4 and 5

Step 3 (Delegate):

The Delegate receives an email with a Delegation Code and “REGISTER” link. Click REGISTER and enter the Delegation Code from the email when prompted. Note: the Delegation Code expires within 7 days.



As part of this step, the Delegate will need to provide an identifying number to verify identity/authorization. The Delegate can enter the producer ID, agent number, annuity contract number or life policy number:



Step 4 (Delegate):

The Delegate will then be prompted for the Delegator’s email address, identifying number (see right), personal information, and then select a username and password.

Step 5 (Delegate):

After registration is complete, the user will be prompted to log in and set up two-factor authentication. Upon successful registration and log in, the delegate may view the financial professional’s web experience.

AFTER delegation is set up:

An existing Delegate can request delegate access from ACCESS & PERMISSIONS by selecting the “REQUEST ACCESS” button and entering the email address of the financial professional, aka “Delegator” they want access to. The financial professional will receive an email with instructions for setting up Delegate access. Also, multiple Delegators can have the same Delegate. The Delegator completes steps 1 and 2, and the Delegate enters the new code in ACCESS & PERMISSIONS.

Both the Delegator and Delegate will receive notification to extend access prior to when permissions will expire, which is every 365 days or the end date set by the delegator, whichever comes first.

If you need further assistance, please contact LFD Support at 877-533-1022, or Webmaster@lfd.com.