Lincoln Financial Network®

A member of Lincoln Financial Group

Strategic Alliance Partnerships

Business-to-business resources for your financial services solutions

STRATEGIC ALLIANCE

Partner of Choice Brochure

Partner with us

Plan with us

Grow with us

Our partnership begins with understanding your individual and firm-level growth goals, the ideal clients you want to attract, and offering solutions that help you and your business move forward. LFN's core philosophy is always to do what's best for our clients. This begins with you.

We are the partner of choice for an array of business professionals

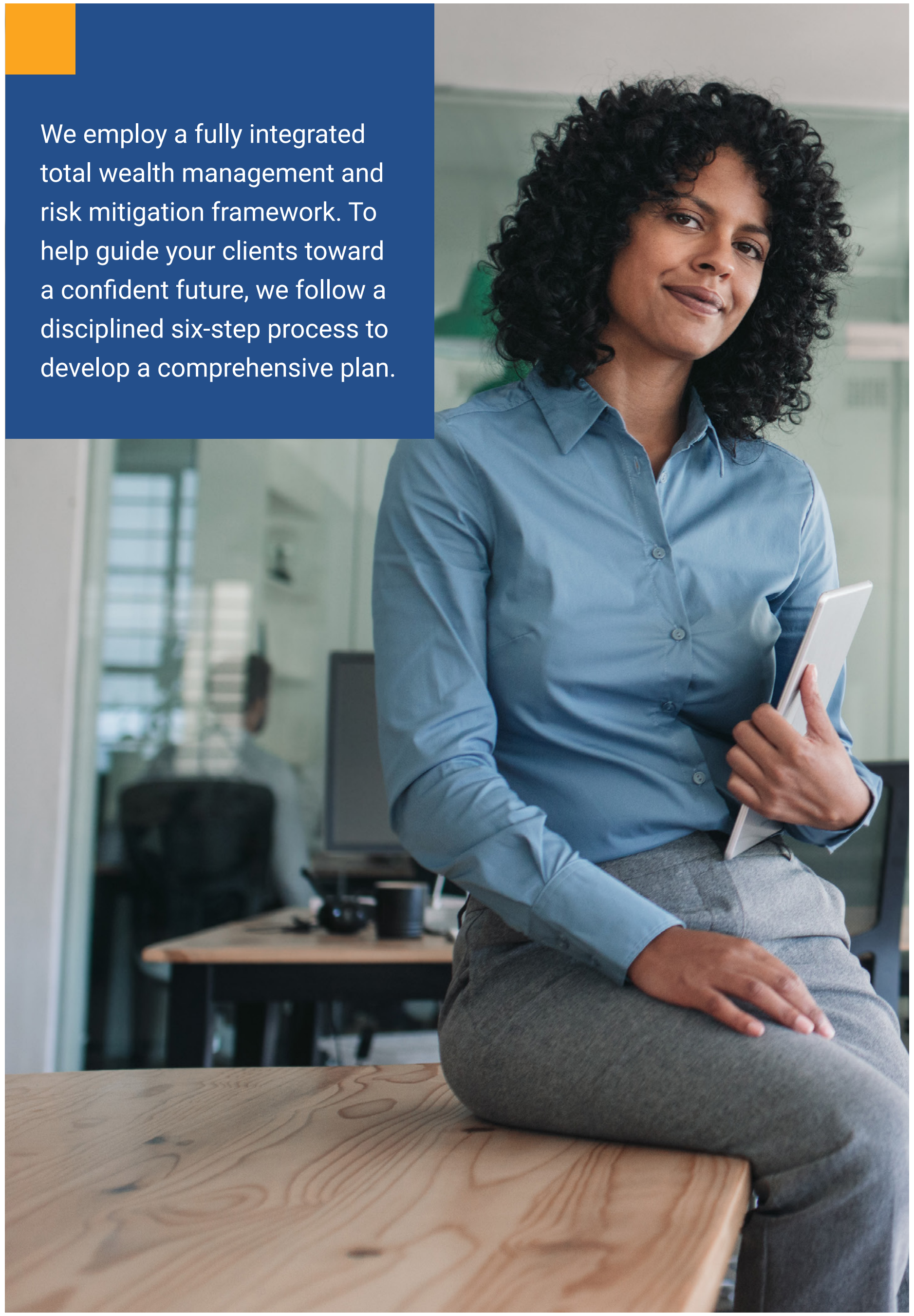
A mutually beneficial partnership with LFN's Strategic Alliance team can offer you the ability to provide resources and solutions for planning, growing and protecting your clients' financial future. Your clients will have access to financial planning, asset management and risk mitigation solutions coupled with unparalleled personal services in the industry.

What sets us apart?
We provide the platform for a partnership that helps you and your clients reach their goals.

Below are a few of the types of partners that work with us:

Attorneys	Credit Unions	Regional Broker-Dealers
Accountants	P&C	Wealth Managers
RIAs	Mortgage Brokers	
Banks	Health Insurance Brokers	

We employ a fully integrated total wealth management and risk mitigation framework. To help guide your clients toward a confident future, we follow a disciplined six-step process to develop a comprehensive plan.



Our financial planning culture

1. ENGAGE
Define Scope. Establish and define the client/financial professional relationship

2. COLLECT
Data and goal Setting. Gather client data, including goals and expectations

3. ANALYZE
Evaluate Current Plan. Process and analyze information to determine financial needs

4. DESIGN
Present Alternatives. Develop financial planning recommendations and/or alternatives

5. IMPLEMENT
Action Plan and Solutions. Implement the financial plan recommendations

6. REVIEW
Review and Re-evaluate. Review the financial plan recommendations

Access to LFN resources and services

National resources

As a member of the Lincoln Financial Group, the marketing name for Lincoln National Corporation (NYSE:LNC) — a Fortune 500 company — we operate from a position of strength. Committed to providing outstanding personal service, we utilize a team approach anchored by highly skilled financial professionals who manage all pertinent aspects of the financial planning process — and the solutions that best suit your client needs.

Open architecture

By partnering with LFN, your clients have access to offer an open architecture for products and solutions while not being held captive by one single company. We are a recognized leader in providing sophisticated financial and estate planning. Objectivity is the key to our process.

Our open architecture platform gives our financial professionals access to Lincoln products and dozens of highly-rated companies through our insurance brokerage organization. In addition, we provide access to nearly 100 private money managers nationwide, thousands of mutual fund managers, exchange traded funds, individual issue bonds, TIPS, public and private REITs, and hundreds of fixed and variable annuity contracts.

Our services

With LFN's Strategic Alliance team, we offer you resources that can help you expand your business offerings, grow your business partner resources, and help you provide risk mitigation solutions for you and your clients.

We do this through three key lines of business for your clients

1. **Fixed insurance solutions**
2. **Advisory Fees**
3. **Securities**

Additional key resources

- LFN's Business Intelligence Institute
- Lincoln Executive Consulting
- National Planning Institute
- National Recruiting team
- BizEquity, business valuation tool
- Professional employer organizations

Marketing/Contracts/Support

The world is constantly evolving, which means how you reach your clients is changing too. We're here to help you by offering:

- Marketing and PR resources
- Regional and national campaigns
- Co-branding opportunities
- Local advertising (if applicable)
- Joint client events
- Indemnification clauses
- Licensing and administrative support
- Back-office business processing

Your partnership. Your clients. Your choice.

As a company, we believe in providing our clients with clarity and solutions that help meet their needs. Long-term relationships are more important than short-term gains, and we will never sacrifice the former for the latter. The key qualities of Lincoln Financial Network include:

- Conviction in everything we do
- Courage to get our clients to take action
- Competency fueled by continuing education and training
- Bringing national resources together on a team to benefit each client
- Communication that builds understanding and trust

These are the commitments we make to each of our clients.

If you'd like to help your clients plan, grow and protect their financial future, let's do it together.

Call 757-777-3163 or email StrategicAlliance@LFG.com
to get started.

LincolnFinancial.com

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Affiliates are separately responsible for their own financial and contractual obligations.

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