

Lincoln Financial Earns DALBAR Award for Excellence in Annuity Illustrations

(Marlborough, MA, March 13, 2024) DALBAR, Inc. is recognizing **Lincoln Financial Group** for a 5th consecutive year for arming advisors with a vital tool for use in their sales process. The firm sets the standard with annuity illustrations that speak to current and prospective clients with a complete and highly comprehensible picture of how an annuity can address their needs. Lincoln Financial's illustrations feature clear depictions of protected income and use color generously to highlight key values and performance under different market conditions. This provider stands apart from competitors and many out-of-the-box illustration tools that rely on numerous pages of data-driven tables and lack the color, visuals and organization of Lincoln's easy-to-digest projections and illustration assumptions.

"We are honored to once again earn this recognition, which reinforces our commitment to providing a superior annuity experience," said Daniel Herr, senior vice president of Annuity Product at Lincoln Financial Group. "The attention and detail placed on our annuity illustrations is just one of the many ways Lincoln arms its current and future clients with the tools they need to be confident in their financial futures."

DALBAR's review of annuity illustrations included 11 leading annuity firms and rated illustrations based on 17 categories, ranging from the display of key contract and illustration details to the overall design and format.

About DALBAR, Inc.

DALBAR, Inc. has a 46-year history and is recognized by the industry and government as an independent third-party expert in the business of providing audits, evaluations, ratings, and due diligence certifications.

About Lincoln Financial Group

Lincoln Financial Group helps people to plan, protect and retire with confidence. As of December 31, 2023, approximately 17 million customers trust our guidance and solutions across four core businesses – annuities, life insurance, group protection, and retirement plan services. As of December 31, 2023, the company had approximately \$295 billion in end-of-period account balances, net of reinsurance. Headquartered in Radnor, Pa., Lincoln Financial Group is the marketing name for Lincoln National Corporation (NYSE: LNC) and its affiliates. Learn more at LincolnFinancial.com.

For more information visit www.dalbar.com or contact us at info@DALBAR.com

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