LPL Financial

LPL Financial Adopts Lincoln Financial Group's Interactive Annuity Visualizer Application

Jun 4, 2013

RADNOR, Pa., June 4, 2013 /PRNewswire/ -- Lincoln Financial Distributors (LFD), the wholesale distribution subsidiary of Lincoln Financial Group (NYSE: LNC), today announced that LPL Financial adopted its interactive Annuity Visualizer as part of its existing annuity tools and resources platform. The new tool, which is being customized specifically for LPL advisors, was designed to help them clearly and quickly highlight the benefits of annuities as part of a client's retirement plan and the different rider options available.

Lincoln's Annuity Visualizer technology was developed in response to the marketplace's call for a better way to help simplify the retirement message and educate advisors and clients about the value of using annuities for income.

"We've heard from our partners about the need for an easier way to deliver guidance on statistical information, hypotheticals and product specifications," said John Kennedy, head of Retirement Solutions Distribution for LFD. "Until the introduction of Lincoln's application, advisors went through a multitude of steps to get the same information the Visualizer provides in significantly less time."

LPL Financial is the nation's largest independent broker-dealer,* and is the first to adopt this new technology into its day-to-day practice.

Rob Pettman, Senior Vice President, Investment and Planning Solutions of LPL Financial said, "It's a focus of ours to offer tools to LPL Financial advisors that can enhance their client's education, process and experience. The Annuity Visualizer tool provides a new medium to have meaningful dialogue around insured retirement income strategies as it offers an interactive and personalized way of bringing these concepts to life."

Pioneering the Way the Income Distribution Story is Told
Lincoln Financial has been active in partnering with advisors to design a better way to effectively prepare their clients in this area. In 2012, the company developed an easy-to-use web-based application, the Annuity Visualizer, enabling advisors to better inform consumers and help meet their needs around income distribution.

Used as a dynamic and interactive tool, Lincoln's Annuity Visualizer streamlines the process, incorporates hypotheticals, case studies and marketing collateral to help wholesalers and advisors quickly explain the various options available to their clients.

"Lincoln is pioneering the way the income distribution story is told by advisors," said Kennedy. "This is just the beginning, and an example of how Lincoln is continually looking for ways to help advisors grow their business while ensuring their clients are able to meet specific needs."

About LPL Financial
LPL Financial, a wholly owned subsidiary of LPL Financial Holdings Inc. (NASDAQ: LPLA), is the nation's largest independent broker-dealer,* a top RIA custodian, and a leading independent consultant to retirement plans. LPL Financial offers proprietary technology, comprehensive clearing and compliance services, practice management programs and training, and independent research to more than 13,300 financial advisors and approximately 700 financial institutions. In addition, LPL Financial supports more than 4,500 financial advisors licensed with insurance companies by providing customized clearing, advisory platforms and technology solutions. LPL Financial and its affiliates have approximately 2,900 employees with primary offices in Boston, Charlotte, and San Diego. For more information, please visit www.lpl.com.

Securities and Advisory Services offered through LPL Financial. A Registered Investment Advisor, Member FINRA/SIPC

LPL Financial is not affiliated with Lincoln National Corporation

*Based on total revenues, Financial Planning magazine, June 1996-2013

About Lincoln Financial Group
Lincoln Financial Group is the marketing name for Lincoln National Corporation (NYSE: LNC) and its affiliates. With headquarters in the Philadelphia region, the companies of Lincoln Financial Group had assets under management of $186 billion as of March 31, 2013. Through its affiliated companies, Lincoln Financial Group offers: annuities; life, group life, disability and dental insurance; employer-sponsored retirement plans; savings plans; and comprehensive financial planning and advisory services. For more information, including a copy of our most recent SEC reports containing our balance sheets, please visit www.LincolnFinancial.com.

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