

Year-End Business Cut-Off Dates: Individual Annuities

Listed below are some important cut-off dates regarding year-end processing of 2017 Good Order business. Please keep in mind that transactions processed after the deadline or cut-off dates will be completed on a best-efforts basis with no guarantees as to the tax year in which they will be reported.

- All annuity business mail (applications, checks, financial request, etc.) must be received in good order in the appropriate location by 4:00 p.m. ET on the date specified below.
- The dates shown in the chart do not represent 2017 compensation payout.
- The contract must issue in 2017 in order to earn 2017 production credit with Lincoln.

Request or Process	Deadline	Notes
New Business – Applications accompanied by the premium:		
• Income annuities	December 22, 2017	Includes <i>Lincoln Insured Income</i> SM Immediate Annuity (SPIA) and <i>Lincoln Deferred Income Solutions</i> SM Annuity (DIA)
• Fixed indexed annuities	December 21, 2017	Issue date of December 22, 2017
• Fixed annuities	December 22, 2017	

New Business – Applications without money (For Rate Lock purposes only):

All fixed, fixed indexed and income annuities	December 22, 2017	The cut-off date for "Applications <u>without</u> money" is for rate locks only. Standard rate lock procedures apply. This date does not pertain to Lincoln production credit or the issue date.
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Contact the appropriate New Business Case Coordinator with any questions regarding the above charts.

Financial Distributions:

Withdrawals, internal transfers, surrenders, loans, one-time RMDs	December 26, 2017	"In good order" requests received prior to December 26, 2017 will ensure 2017 tax reporting.
Automatic Withdrawal Service (AWS) for RMD	December 8, 2017	"In good order" requests received prior to December 8, 2017 will ensure 2017 tax reporting.

Thank you for your business.