



New Technology Debuts This Week!

Lincoln Investment’s technology platform is about to get a whole lot better.

On Tuesday, March 15, the much-anticipated **AdvisorLinc** rolls out to the first group of users in the home office and branch locations. See the list of branches below:

What is AdvisorLinc?

AdvisorLinc is the new advisor website that will increase efficiency, create process and data alignment across Lincoln and Pershing platforms and help advisors reflect value to their clients. The site has been in production for over a year, and incorporates a customizable dashboard based on widgets for greater flexibility and ease of use.

Users will realize the benefits of *AdvisorLinc* immediately. Not only will new technology automate administrative tasks and speed up processing times, but it will also improve the quality and consistency of the work completed.

Once the site goes live, employees will land on the *AdvisorLinc* site (rather than the staff site) each time they click on Internet Explorer. This will allow users to become acquainted with AdvisorLinc—and all it has to offer—fast! To reach the staff site, click on the “**Return to Field Site**” link located on the left hand side of the *AdvisorLinc* landing page.

More Enhancements on the Way

Over the past few months, nearly 50 advisors and home office employees tested *AdvisorLinc*, and based on their feedback, enhancements were made to improve the system. We will continue to roll out different phases with enhancements throughout the year, as *AdvisorLinc* is an ongoing project influenced by you and your requirements. Be sure to use the feedback link to send any comments, questions or suggestions you may have. Your opinion does count!

Phase one will include the ability to customize screen views and menus, an enhanced user interface with easier access to functions currently available on the Field site, new widgets and features to streamline information and an integrated CRM system. Future phases include eSignature capabilities for all forms, fee-based enhancements, financial planning integration, additional third party tools and much more.

We hope you enjoy exploring *AdvisorLinc*. For your convenience, a series of training sessions are scheduled for this week to get everyone up to speed. Until then, browse through the updates and training materials available in the [AdvisorLinc Online Resource Center](#).

