

Built-in accountability for efficient plan administration

Lincoln *LifeComp*® suite

Questions about Lincoln *LifeComp* services?

For more information about Lincoln *LifeComp* full plan administration, contact Lincoln at 800 331-2760 or lifecomp@lfd.com.

Lincoln*LifeComp* is a suite of four employer-sponsored and two private estate plans that are designed to help companies retain and reward selected employees, and allow individuals to obtain needed estate liquidity while minimizing gift tax implications. All plans in the *LifeComp* suite are funded through life insurance policies. *LifeComp* offers many potential client advantages, including flexible levels of control, access to account values, and potential tax savings.

Traditionally, complex and time-consuming plan administration has been a major obstacle to implementation. That's why Lincoln does more than manage the underlying policies—we take the leading role in administering the plans. For more than 20 years, *LifeComp* has given accountants, attorneys, and other advisors the support services they need to appropriately monitor their clients' plans.

To start, *LifeComp* provides sample uniform plan documents that do not require custom drafting. Once the plans are in place, Lincoln oversees a complete accounting and plan administration package at a modest fee, which includes:

- **Monthly/modal accounting memorandums** that give clients or accountants exact dollar entries and (when applicable) coordinate any employee buy-out of the business's interest in a policy
- **Fiscal year-end reports** for precise balance entries over the previous 12 months
- **Annual reevaluations** that track plan progress relative to original objectives
- **Annual proposals** that illustrate corrective measures should the reevaluation detect shortfalls
- **Equity reports provided on demand** that show point-in-time values and benefits
- **Postretirement services** available to help retired plan participants monitor withdrawal/loan activity

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Lincoln Financial Group has filed a patent on the Lincoln *LifeComp*® system and its various programs, which include *LifeComp*® ExecBonus, *LifeComp*® DollarFlex, *LifeComp*® DuoFlex, *LifeComp*® FlexKey, *LifeComp*® Private Estate Solutions, and *LifeComp*® Private Value Access.

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