

Meeting the needs of your clients

Why banks and credit unions partner with Strategic Alliance



Leverage Lincoln Financial Network's Strategic Alliance Team for wealth management, insurance solutions and financial planning expertise

Through third-party relationships and organizational resources, Lincoln Financial Network offers a program to banks and credit unions to provide a support network of financial planning specialists to help meet the goals of your clients. As a result, clients receive a more comprehensive approach to meet their needs and gain direct access to a broad portfolio of wealth management and risk management solutions.

Why work with Strategic Alliance?

We will help you to:

- Partner with local Lincoln Financial Network wealth management and insurance specialists
- Attract and retain your clients by offering services and solutions to help meet their financial objectives
- Provide financial education to help clients become more engaged in the financial planning process
- Differentiate the client experience by offering retirement planning, estate planning, insurance analysis and solutions built for your business owner clients
- Enhance services and revenue without adding unnecessary expense to your bottom line

LFN Strategic Alliance is an experienced team that can offer customized program solutions. With the resources of LFN, bank and credit union institutions can establish themselves as leaders in their community, providing holistic financial services to enhance client loyalty.

Strategic Alliance does this through:

- Joint business planning to set growth targets and provide revenue generation opportunity
- Leverage training programs and compliance resources to educate the bank/credit union branch managers, loan officers, and staff
- Offer enhanced platforms to help meet your client needs and your business needs including but not limited to expedited issuance of life insurance as collateral for small business loans

A National Team of Resources

As a member of the Lincoln Financial Group of companies, Lincoln Financial Network has access to the resources of Lincoln National Corporation, a Fortune 200 organization with the ability to leverage significant experience in national, regional and local relationships: attorneys, broker-dealer firms, accounting firms, financial institutions, fire & casualty insurance brokers and other professionals. Lincoln Financial also offers:

- A network of certified and specialized advisors with wealth, investment & risk management expertise
- Over 20 partnerships and affiliations, resulting in hundreds of opportunities for our Strategic Alliance networks
- Lincoln National Corporation has \$270 billion in assets with over 110 years of life insurance and other product development with A+ rating for The Lincoln National Life Insurance Company as of June 30, 2020
- Hold harmless & non-compete agreements
- Access to intellectual capital across the United States
- Wealth preservation specialists with over 30 years of industry experience

Consumers seek exceptional service, education and information when managing their personal finances. Partnering with Lincoln Financial provides greater access to competitive product solutions to help meet your clients' comprehensive financial planning needs without incurring the extra expense of additional internal resources and headcount.



Call 757-777-3163 or email StrategicAllianceTeam@lfg.com to get started.

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