

# How to do business with Lincoln Financial Group

## **Website:**

- Once your agent code is activated, you may access Lincoln Financial Group's website by going to [www.lfg.com](http://www.lfg.com) and registering. From this website you can check the status of any pending applications, obtain blank applications, forms, etc...

## **Submitting New Business:**

- New applications can be sent to Holly at 1-800-448-9356 or [holly@ogletreefinancial.com](mailto:holly@ogletreefinancial.com).

## **Checking Case Status:**

- TAKE CARE OF YOUR BUSINESS! Case status can be check under Quick Links at Pending Status on Lincoln's website home page. Requirements may be sent to Holly at 1-800-448-9356 or [holly@ogletreefinancial.com](mailto:holly@ogletreefinancial.com). If you prefer to send them directly Lincoln use 1-877-233-8629 or [NBAgencyTeam@lfg.com](mailto:NBAgencyTeam@lfg.com). Be sure to note the policy number and client name.
- You may call Lincoln at 1-866-227-6471 or Holly with Ogletree Financial Services 1-800-466-8186 Ext. 3 with any questions.

## **Where to submit monies to Lincoln Financial Group:**

- If an agent takes a check with the application, mail the check directly to  
Lincoln Financial Group  
One Granite Place  
PO Box 515  
Concord, NH 03301  
Attn: Underwriting & New Business

Remember to note the client's social security number on the memo line of the check and include a copy of the TIA.

*Should you have further questions call  
Holly with Ogletree Financial Services  
1-800-466-8186 Ext. 3*



# Industry-Leading Underwriting

## Agency Team Contact Information

### Contact Information

Mailing address	Quick Quotes	Toll-free number	Dedicated fax line
Lincoln Financial Group Underwriting & New Business One Granite Place, MC 3N26 Concord, NH 03301	<a href="mailto:AgencyQuickQuotes@lfq.com">AgencyQuickQuotes@lfq.com</a>	866 227-6471	877 233-8629

### New Application & Requirement Attachments Only

	E-mail
Dedicated E-mail	<a href="mailto:NBAgencyTeam@lfq.com">NBAgencyTeam@lfq.com</a>

### Leadership

	Role	Telephone	E-mail
Tracy Dyer	AVP, Underwriting Account Executive	603 226-5486	<a href="mailto:Tracy.Dyer@lfq.com">Tracy.Dyer@lfq.com</a>
Kara Adams	Operations Manager	603 226-5015	<a href="mailto:Kara.Adams@lfq.com">Kara.Adams@lfq.com</a>
John Condon	Senior Underwriting Director	603 226-5091	<a href="mailto:John.Condon@lfq.com">John.Condon@lfq.com</a>

### Underwriters

	Role	Telephone	E-mail
Patricia Cain	Associate Underwriting Director	866 863-8493	<a href="mailto:Patricia.Cain@lfq.com">Patricia.Cain@lfq.com</a>
Phil Paveglio	Associate Underwriting Director	603 529-6724	<a href="mailto:Phil.Paveglio@lfq.com">Phil.Paveglio@lfq.com</a>
JaLayne Kuzma	Senior Underwriter	603 223-5845	<a href="mailto:JaLayne.Kuzma@lfq.com">JaLayne.Kuzma@lfq.com</a>
Susan Waskom	Senior Underwriter	336 691-3546	<a href="mailto:Susan.Waskom@lfq.com">Susan.Waskom@lfq.com</a>
Judy Foss	Underwriter	603 226-5182	<a href="mailto:Judith.Foss@lfq.com">Judith.Foss@lfq.com</a>
Alysia Lehneman-Tilton	Underwriter	603 223-5847	<a href="mailto:Alysia.Lehneman-Tilton@lfq.com">Alysia.Lehneman-Tilton@lfq.com</a>

### New Business Associates

	Role	Telephone	E-mail
Heather Cobb	Senior New Business Associate	603 226-5006	<a href="mailto:Heather.Cobb@lfq.com">Heather.Cobb@lfq.com</a>
Andrea Lewis	Senior New Business Associate	603 229-6219	<a href="mailto:Andrea.Lewis@lfq.com">Andrea.Lewis@lfq.com</a>
Jennifer Levesque	New Business Associate II	603 226-5115	<a href="mailto:Jennifer.Levesque@lfq.com">Jennifer.Levesque@lfq.com</a>
Bobbi Carlson	New Business Associate	603 226-5386	<a href="mailto:Roberta.Carlson@lfq.com">Roberta.Carlson@lfq.com</a>
Laurie Gross	New Business Associate	603 226-5902	<a href="mailto:Laurie.Gross@lfq.com">Laurie.Gross@lfq.com</a>
Thomas Maxwell	New Business Associate	603 226-5565	<a href="mailto:Thomas.Maxwell@lfq.com">Thomas.Maxwell@lfq.com</a>
Rachel McKamy	New Business Associate	603 226-5180	<a href="mailto:Rachel.McKamy@lfq.com">Rachel.McKamy@lfq.com</a>
Alicia Rainville	New Business Associate	603 226-5905	<a href="mailto:Alicia.Rainville@lfq.com">Alicia.Rainville@lfq.com</a>

Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates.