

HOW TO DO BUSINESS WITH OAKTREE BROKERAGE and Lincoln Financial Group

Submission:

- -All new business applications should be faxed to 800-867-7205, emailed to brokerageservices@otfc.com or mailed to the address below.
- Please be sure to send new business application to us using the New Business Transmittal attached. (Be sure to include your email address, this will be how you are notified that the application has been received and given a policy number.)
- If you do not receive an acknowledgment email within 1 business day, please call or email for receipt confirmation.

Checking Case Status:

- Agents should register on the carrier website at www.lfd.com for case statuses, however, you will receive regular case status emails from Broker Services.
- Please be sure to have the policy number and client name available during all correspondence.

Requirements and Monies:

- Requirements should be faxed to 800-867-7205 with a cover sheet indicating the client name and policy number.
- Please be sure to include the policy number on any premiums mailed.
- Mailing address is:

OAKTREE Brokerage
11166 Fairfax Boulevard, Suite 300
Fairfax, VA 22030
Attn: Brokerage Services

- Please do not send checks without a policy number. This could delay issue.

Illustrations and Marketing Support:

- Agents needing illustration and/or marketing support should contact their Life Sales Rep or a member of the Sales Support Team at 800-842-9124 ext.113 or email them at salesupport@otfc.com



Brokerage Services

Fax Number: 800-867-7205

OAKTREE Brokerage

11166 Fairfax Blvd. Suite 300

Fairfax, VA 22030

Attn: Brokerage Services-800-842-9124 ext. 444

Please fill in fields below.

TRANSMITTAL

DATE:

AGENT:

AGENT CODE:

AGENT FAX NUMBER:

AGENTPHONE NUMBER:

PROPOSED INSURED:

CARRIER:

SSN OR POLICY # (IF AVAILABLE):

ORDER EXAM YES NO

TOTAL # OF PAGES (WITH COVER SHEET):

NEW APPLICATION

REQUIREMENT

LICENSING

INFORMAL APPLICATION

Comments:

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