

E&O CLAIM - FIRST REPORT FORM

*LINCOLN NATIONAL CORP.
ERRORS & OMISSIONS INSURANCE PROGRAM*

Date:	Policy #: 039887936 (4/1/2020 to 4/1/2021)
Insured:	
Lincoln Affiliation (check one): <input type="checkbox"/> LFA Rep <input type="checkbox"/> LFS Rep <input type="checkbox"/> Life Only	
Business Address:	
Office Mail Code:	
Phone:	
1. Date you became aware of this claim:	
2. Do you have any other Errors & Omissions Insurance? If so, give name of Company, Policy Number and limits:	
3. The type of potential business discussed or written for the claimant (client/policyholder). If the business was written or was to have been written by any company other than LNC, give the name of the Company, Policy Number and Dates:	
4. Client/policyholder making the claim against you or involved in the claim/potential claim: Name: Address:	
5. Provide narrative pertaining to involvement in this claim and attach copies of all pertinent correspondence. If the claim is a result of a trade or allocation error, or the failure to execute a trade on behalf of your client, contact the account provider to correct the error as soon as possible and provide a copy of the gain/loss calculation to the claims analyst (use additional stationery for narrative if necessary):	
I acknowledge that the events described above and attached herewith are consistent with my understanding of the events that resulted in this claim or potential claim.	
Please attach chronological narrative of incident and provide a copy of all papers relative to the situation. Notification of claims or potential claims should be mailed or forwarded electronically without delay to:	
Lancer Claims Services A Division of Brown & Brown Program Insurance Services, Inc. First Report Desk 681 S. Parker Street, 3rd Floor Orange, CA 92868 Fax #: 714-978-8023 Email: firstreports@lancerclaims.com	
All lawsuits and other urgent matters must be sent electronically to the above claim address or fax number. YOU MUST COMPLETE AND SUBMIT THIS FORM TO PERFECT NOTICE OF A CLAIM. If you have questions or your matter requires immediate attention, please call Emily Robertson at 714-939-7319 or Lynn Johnson at 714-939-7430. Do not discuss this matter with anyone unless they identify themselves to be from Lancer Claims Services, Lincoln National Corporation or an authorized representative.	