

Sample Broker of Record Letter (Other than CF)  
(Must be on the Company's Letterhead)

Date

Broker Name  
Broker Address  
Broker City, State and Zip  
Re:

Lincoln Financial Group  
8801 Indian Hills Drive  
Omaha, NE 68114

To Whom It May Concern:

This is to notify you that I have appointed **Broker Name** of **Agency Name** whose business address is **Street Address, City, State and Zip** as my broker of record with respect to coverage provided by **Lincoln**.

This appointment is in conjunction with GBS as the **Administrator or Wholesaler**. This letter authorizes the broker named and Group Benefit Services, access to all necessary PHI (personal health information) effective immediately.

Sincerely,

Client Name and Title

Cc:

**Carriers and Products included in this BOR:**

<b>Carrier</b>	<b>Product</b>