

Lincoln Financial Claims Title of Top Annuity Illustration for Sixth Consecutive Year

(Marlborough, MA, January 13, 2025) Lincoln Financial takes the number one spot for annuity illustrations for the sixth year, earning DALBAR's Pyramid of Communications Excellence, by providing financial advisors with a dynamic tool that demystifies the important factors when considering an annuity. This latest achievement stems from its innovative approach to annuity illustration design, which transforms complex financial information into an intuitive, client-friendly experience. By leveraging sophisticated data visualization techniques, Lincoln Financial has created an illustration that not only informs but empowers.

What sets Lincoln Financial's illustration apart is its strategic blend of design and substance. The materials feature:

- Sleek, subtle corporate branding that enhances rather than distracts from critical information
- User-friendly and comprehensive tables, charts and icons that highlight protected income amounts and allocation strategies
- Succinct explanations of important details like client's needs and how protected income works and clear explanations of key terms
- Strategic color design that enhances information clarity

"While 66% of consumers are familiar with workplace retirement savings accounts, only 39% are knowledgeable about annuities¹. Our illustrations are an important tool for helping financial professionals bridge consumer knowledge gaps and simplify conversations around annuities with their clients," said Kathy Kavanaugh, senior vice president, chief marketing officer, individual solutions and brand, Lincoln Financial. "From our illustrations to our new [digital rate center](#), Lincoln is continuously elevating the annuity experience to meet the wants and needs of financial professionals and their clients."

DALBAR sampled illustrations from 11 leading annuity firms, assessing their effectiveness in displaying contract and illustration details as well as their overall design and format.

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¹Source: Lincoln Financial, Consumer Sentiment Tracker, January – July 2024

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