

School Safety Comes First



Regarding the security protocols and procedures in your district, we are aware of the required school building etiquette for any visits.

Lincoln Investment financial professionals follow these procedures:

- » School visits are scheduled in advance through the appropriate designated person at either the school building or business office depending upon the school district's specific policy
- » Visitor procedures are followed at your school district regarding to building arrival check-in including, signing in and out, wearing a visitor's badge and any school specific requirements
- » Visits and activities to your school are monitored by a Lincoln Investment supervisor

Did you know that our financial professionals are also required to complete the following prior to being affiliated with the Lincoln Investment Companies:

- » Fingerprinted for FBI clearance
- » Comprehensive criminal and financial background investigations
- » Annual continuing education on industry regulatory updates and changes

Many Lincoln Investment financial professionals are NTSA CRES* certified. CRES advisors help educators with financial literacy through worksite education and are exclusively permitted to participate in this financial literacy Education program for public school employees. Safety will always be the primary concern when visiting a school; we all need to look out for each other.

*National Tax-Deferred Savings Association – Certified Retirement Education Specialist

The NTSA Certified Retirement Education Specialist (CRES) advisor is qualified and available to teach the Retirement Education program to school district employees. The CRES has completed a certificate program through the American Retirement Association (ARA) Retirement Planning Academy, addressing the important retirement planning considerations of public employees. The NTSA CRES advisor has agreed to abide by the highest standards of professional conduct and to coordinate all educational activity in accordance with school district solicitation policies and guidelines. CRES is an annual certification of an advisor's commitment to the CRES standards and practices.



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