

# Critical Deadline for MoneyGuard Cases Funded via 1035 Exchange

Lincoln has recently clarified the transition rules for MoneyGuard II and MoneyGuard Reserve cases funded via 1035 exchange: Based on an abundance of caution relative to processing times at carriers releasing 1035 funds to Lincoln, all applications for 1035 exchange funded cases must be received at the Lincoln home office by 10/1/2019. Read on for the details!

Find out more about these changes from Lincoln...

- [Lincoln Leader: September 23rd Edition](#)
- [MoneyGuard III Announcement](#)

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## From Lincoln Financial...



Due to the unique business processes for Lincoln MoneyGuard and to help ensure a positive client experience while complying with these new industry regulations, **all external 1035 exchange applications for Lincoln MoneyGuard® II (2019) and Lincoln MoneyGuard® Reserve must be received by Lincoln on or before October 1, 2019.** Lincoln MoneyGuard II and MoneyGuard Reserve are non-PBR/2017 CSO compliant and all non-compliant products must be placed in-force with premium by December 31, 2019.



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