

Coronavirus (COVID-19) Impact Certification Form Overview

The Coronavirus (COVID-19) Impact Certification form is available to assist with COVID-19 related transactions.

Who is eligible?

- » Individuals who are diagnosed with the virus SARS-CoV-2 or with coronavirus disease 2019 (COVID-19) by a test approved by the Centers for Disease Control and Prevention
- » Individuals whose spouse or dependent (as defined in section 152 of the Internal Revenue Code of 1986) is diagnosed with such virus or disease by such a test
- » Individuals who experience adverse financial consequences as a result of:
 - being quarantined
 - being furloughed or laid off
 - having work hours reduced due to such virus or disease
 - being unable to work due to lack of child care due to such virus or disease
 - closing or reducing hours of business owned or operated by the individual due to such virus or disease
 - other factors as determined by the Secretary of the Treasury (or the Secretary's delegate)

Transactions that require this form be submitted to Lincoln Investment:

- » Distribution and Loan requests from Employer plans. NOTE: Employer Plan participants MUST get TPA or Employer approval prior to submitting a request.
- » IRA distributions requested via form

Form submission is not required for the following transactions; however, it is recommended that you complete and retain a copy for your records:

- » Requests for loans repayment suspension
- » Online distribution requests from IRA Accounts