

# 2001 UNIFORM BUSINESS REPORT (UBR)

DOCUMENT # 857717

1. Entity Name  
LINCOLN FINANCIAL DISTRIBUTORS, INC.

Principal Place of Business  
900 COTTAGE GROVE RD.  
BLOOMFIELD CT 06002

Mailing Address  
C/O TRINA MILLS  
1300 S CLINTON STREET  
FORT WAYNE IN 46802

2. Principal Place of Business  
~~Two Commerce Square.~~

Suite, Apt. #, etc.  
2001 Market Street

City & State  
Philadelphia, PA

Zip  
19103

Country

3. Mailing Address  
c/o Cherry Whitaker

Suite, Apt. #, etc.  
350 Church Street

City & State  
Hartford, CT

Zip  
06103

Country

**FILED**  
**Aug 31, 2001 8:00 am**  
**Secretary of State**

08-31-2001 90238 006 \*\*\*550.00



DO NOT WRITE IN THIS SPACE

4. FEI Number  
06-0841987

Applied For  
Not Applicable

5. Certificate of Status Desired ☐

\$8.75 Additional  
Fee Required

## 6. Name and Address of Current Registered Agent

CORPORATION SERVICE COMPANY  
1201 HAYS STREET  
TALLAHASSEE FL 32301

## 7. Name and Address of New Registered Agent

Name  
Street Address (P.O. Box Number is Not Acceptable)  
City FL Zip Code

8. The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.

SIGNATURE

Signature, typed or printed name of registered agent and title if applicable.

(NOTE: Registered Agent signature required when reinstating)

DATE

9. This corporation is eligible to satisfy its Intangible  
Tax filing requirement and elects to do so.  
(See criteria on back) ☐

**FILE NOW!!! FEE IS \$550.00**  
**After September 12, 2001 Fee will be \$750.00**  
**Make Check Payable to Department of State**

10. Election Campaign Financing  
Trust Fund Contribution. ☐

\$5.00 May Be  
Added to Fees

## 11. OFFICERS AND DIRECTORS

TITLE VP  
NAME CHRZAN, JANET C  
STREET ADDRESS 1500 MARKET ST, SUITE 3900  
CITY-ST-ZIP PHILADELPHIA PA 19102 ☒ Delete

TITLE AS  
NAME MILLS, TRINA  
STREET ADDRESS 200 EAST BERRY ST  
CITY-ST-ZIP FORT WAYNE IN 46802-2706 ☒ Delete

TITLE DP  
NAME HEMP, MICHAEL J  
STREET ADDRESS 1300 S. CLINTON ST.  
CITY-ST-ZIP FT. WAYNE IN 46802 ☒ Delete

TITLE VCFO  
NAME LYNCH, MATT  
STREET ADDRESS 350 CHURCH STREET  
CITY-ST-ZIP HARTFORD CT 06103-1106 ☒ Delete

TITLE S  
NAME ROSE, CYNTHIA A  
STREET ADDRESS 1300 S CLINTON ST  
CITY-ST-ZIP FORT WAYNE IN 46802 ☐ Delete

TITLE  
NAME  
STREET ADDRESS  
CITY-ST-ZIP ☐ Delete

## 12. ADDITIONS/CHANGES TO OFFICERS AND DIRECTORS IN 11

TITLE P/CEO/D  
NAME Thompson, Westley V.  
STREET ADDRESS Two Comm. Square, 2001 Market St.  
CITY-ST-ZIP Philadelphia, PA 19103 ☐ Change ☒ Addition

TITLE V  
NAME Brallier, Stanley  
STREET ADDRESS 350 Church Street  
CITY-ST-ZIP Hartford, CT 06103 ☐ Change ☒ Addition

TITLE V/COO/D  
NAME Kittredge, David M.  
STREET ADDRESS Two Comm. Square, 2001 Market St.  
CITY-ST-ZIP Philadelphia, PA 19103 ☐ Change ☒ Addition

TITLE CFO/D  
NAME Matheson, Karen  
STREET ADDRESS Two Comm. Square, 2001 Market St.  
CITY-ST-ZIP Philadelphia, PA 19103 ☐ Change ☒ Addition

TITLE  
NAME  
STREET ADDRESS  
CITY-ST-ZIP ☐ Change ☐ Addition

TITLE  
NAME  
STREET ADDRESS  
CITY-ST-ZIP ☐ Change ☐ Addition

13. I hereby certify that the information supplied with this filing does not qualify for the exemption stated in Section 119.07(3)(i), Florida Statutes. I further certify that the information indicated on this report or supplemental report is true and accurate and that my signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears in Block 11 or Block 12 if changed, or on an attachment with an address, with all other like empowered.

SIGNATURE:

SIGNATURE AND TYPED OR PRINTED NAME OF SIGNING OFFICER OR DIRECTOR

STANLEY BRALLIER

8/21/01

860-466-1483

Daytime Phone #

0134727 AT

CF2E034 (5/01)

ATTACHMENT  
A0082995

DOC# 857717

► Corporate Directory of Companies and Officers

**Lincoln Financial Distributors, Inc.**  
(Formerly: Sagemark Consulting, Inc.)  
(formerly CIGNA Financial Advisors, Inc.)

Officers  
Directors  
Organization  
Chart



**Address**

1818 Market Street  
Philadelphia PA 19103



**All Mail**

1818 Market Street  
Philadelphia PA  
19103



**Phone/Fax**

**Officers**

Westley V. Thompson President and Chief Executive Officer

Stanley Brallier	Senior Vice President
Philip L. Holstein	Senior Vice President
David M. Kittredge	Senior Vice President and Chief Operating Officer
Stephen Long	Senior Vice President
Karen R. Matheson	Senior Vice President, Chief Financial officer, and Chief Administrative Officer
Charlie Schuhmann	Senior Vice President
Greg W. Zabel	Senior Vice President

Frederick J. Crawford	Vice President and Treasurer
Kim Miner	Vice President

Cynthia A. Rose	Secretary
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Robert K. Gongwer	Second Vice President and Assistant Secretary
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Deborah S. Bauermeister	Assistant Secretary
Brian S. Becher	Assistant Secretary
Renee L. Beeks	Assistant Secretary

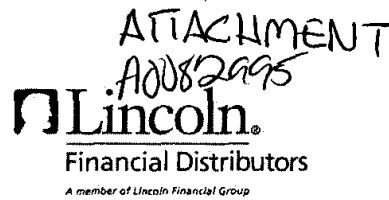
Yvonne J. Bennett-Biggs	Assistant Secretary
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Diane L. Buinowski	Assistant Secretary
Donna J. Cooper	Assistant Secretary
Beverly A. Delaney	Assistant Secretary
Pamela K. Goodling	Assistant Secretary
Torrey Harber	Assistant Secretary
Richard H. Heischman, Jr.	Assistant Secretary
Trina Mills	Assistant Secretary
Robert A. Picarello	Assistant Secretary
Janet L. Sumney	Assistant Secretary
James N. Westafer	Assistant Secretary
Charito C. Whitaker	Assistant Secretary
Susan J. Zartman	Assistant Secretary

Eldon J. Summers	Assistant Treasurer
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David Nold	Financial Officer
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**Directors**



DOC# 857717

Cherry Whitaker  
Compliance Manager  
Lincoln Financial Distributors  
350 Church Street, MLB1  
Hartford, CT 06103  
860-466-1478

August 21, 2001

Division of Corporations  
409 East Gaines Street  
Tallahassee, FL 32399

Re: Uniform Business Report  
Lincoln Financial Distributors, Inc.

To Whom It May Concern:

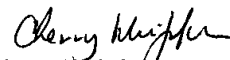
Enclosed are the following:

- ♦ Completed "Uniform Business Report" form
- ♦ Check for \$550.00 representing the filing fee
- ♦ Lincoln Financial Distributors, Inc. List of Officers/Directors

If you have any questions, please give me a call.

Thank you very much for your assistance.

Sincerely,

  
Cherry Whitaker

Lincoln Financial Distributors, Inc.

[http://inlfg.lnc.com/corporate/lincoln\\_financial\\_distributors.htm](http://inlfg.lnc.com/corporate/lincoln_financial_distributors.htm)

**Directors**

David M. Kittredge  
Karen R. Matheson  
Westley V. Thompson

ATTACHMENT  
A0062995

*Last Updated: 08/16/01 01:48 PM*

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