



For use with:
Lincoln Alliance® program



HERO PlusSM input document

Instructions

Lincoln Retirement Services Company, LLC (LRSC) will use the information below to begin the implementation process for your retirement plan(s).

Plan sponsor information

Legal plan name _____

Address _____

City _____ State _____ Zip _____

Contact name _____ Title _____

Email _____ Phone _____

Employer ID (EIN) (9-digit) _____

Plan type: DC DC-NY DB DB-NY

Prior investment provider information *(complete this section for existing plans only)*

Prior investment provider name _____

Contact name _____

Contact phone _____ Email _____

How are assets currently being held? Group plan Individual accounts Other _____

Service provider/TPA firm information *(complete this section for TPA-serviced plans only)*

Service provider/TPA firm name _____

Address _____

City _____ State _____ Zip _____

Contact name _____

Contact phone _____ Contact email _____

Current service provider? Yes No

Financial representative information *(complete this section only if a financial representative is involved)*

Financial representative name _____

Address _____

City _____ State _____ Zip _____

Phone _____ Email _____

Role/paid as? RIA Broker-dealer Advisor

Mutual funds in the Lincoln Alliance® program are sold by prospectus. An investor should carefully consider the investment objectives, risks, and charges and expenses of the investment company before investing. The prospectus and, if available, the summary prospectus contains this and other important information and should be read carefully before investing or sending money. Investment values will fluctuate with changes in market conditions, so that upon withdrawal, your investment may be worth more or less than the amount originally invested. Prospectuses for any of the mutual funds in the Lincoln Alliance® program are available at 800-234-3500.

The program includes certain services provided by Lincoln Financial Advisors Corp. (LFA), a broker-dealer (member FINRA) and an affiliate of Lincoln Financial Group, 1300 S. Clinton St., Fort Wayne, IN 46802. Unaffiliated broker-dealers also may provide services to customers.

Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates. Affiliates are separately responsible for their own financial and contractual obligations.