

Enrollment kit order form

Important: Please complete this form in its entirety to request enrollment kits with the investment lineup effective June 15, 2009 and fax the completed form to 260 455-0200. Delivery of kits may take **7-10 business days** from receipt of a fully completed form. For enrollment meeting support services, please complete the Enrollment Meeting Support Request Form, EM60811-DI-NTB.

Section 1: General information

• **Requestor information**

Name _____

Phone _____ - _____ - _____ E-mail _____

• **Plan information – check one box per row**

Company name _____

Contract: Existing New

Contract number (if assigned) GP _____

• **Plan type:** 401(k) Money Purchase Profit Sharing 457(b) Governmental Plan

• **Roth:** Yes No

• **QDIA selected?** Yes No

If yes, which QDIA? Life Cycle Options (*Wilshire Target Maturity Profiles: SAL1, SAL2, SAL3, SAL4*)

Balanced Options:

_____ SA32 Aggressive Balanced

_____ SA97 LVIP Delaware Foundation Aggressive Allocation

_____ SA21 Balanced

_____ SA95 LVIP Delaware Foundation Conservative Allocation

_____ SA30 Conservative Balanced

_____ SA96 LVIP Delaware Foundation Moderate Allocation

• **Service provider information** TPA name _____

Section 2: Options and quantities

• **Customized enrollment materials** QTY: _____
(Complete section 3 & 4 – May include Financial Advisor name and phone on kit)

• **Additional materials:** QTY: _____
 Participant rollover forms

Spanish language: Additional participant education materials, including Spanish materials, which do not contain time-sensitive or plan-specific information, can be ordered via our web site at www.LincolnFinancial.com or through our sales desk at 877 533-9710.

Section 3: Customization

• Plan name/title on kit front cover _____

• Financial Advisor information on kit back cover (optional)

Name _____

Firm _____

Phone _____ - _____ - _____ E-mail _____

Section 4: Select investment options

- OFFER ALL investment options in the following list to participants.
- OFFER ONLY investment options check marked for a custom lineup.

- OFFER (EX) Lincoln Ibbotson Insight EXPANDED Series to participants.
- OFFER (CO) Lincoln Ibbotson Insight CORE Series to participants.

Conservative

- American Century VP Inflation Protection (SA92) – EX/CO
- American Funds American High-Income Trust (SA1C) – EX
- American Funds Bond Fund of America (SA1E) – EX
- Delaware VIP Diversified Income (SA93)
- Delaware VIP Limited-Term Diversified Income (SA87)
- FTVIPT Templeton Global Bond Securities (SA86)
- Government/Corporate Bond (SA12)
- Guaranteed Account – EX/CO
- High Yield Bond (SA20) – EX/CO
- LVIP SSgA Bond Index (SAL6) – EX/CO
- Short Term (SA14) – EX/CO

Moderate

- Aggressive Balanced (SA32)
- AllianceBernstein VPS Growth and Income (SA19)
- AllianceBernstein VPS Small/Mid Cap Value (SA39)
- American Funds EuroPacific Growth (SA54) – EX
- American Funds Growth Fund of America (SA48)
- American Funds Investment Company of America (SA49)
- American Funds New Perspective (SA34)
- Balanced (SA21)
- BlackRock Capital Appreciation (SA81) – EX
- BlackRock Large Cap Value (SA80) – EX
- BlackRock Mid-Cap Value Equity (SA83)
- Conservative Balanced (SA30)
- Core Equity (SA11)
- Delaware VIP Small Cap Value (SA56) – EX
- Delaware VIP Value (SA61)
- Fidelity VIP Contrafund® (SA35)
- Fidelity VIP Equity-Income (SA57)
- Fidelity VIP Growth (SA58)
- Fidelity VIP Overseas (SA59)
- International Equity (SA22)
- Janus Aspen Janus (SA70)
- Large Capitalization Equity (SA23)
- LVIP Cohen & Steers Global Real Estate (SA55) – EX/CO
- LVIP Delaware Foundation Aggressive Allocation (SA97) – EX/CO
- LVIP Delaware Foundation Conservative Allocation (SA95) – EX/CO
- LVIP Delaware Foundation Moderate Allocation (SA96) – EX/CO
- LVIP Delaware Social Awareness (SA33) – EX
- LVIP Delaware Special Opportunities (SAL7) – EX/CO

Moderate (cont.)

- LVIP Mid-Cap Value (SA38)
- LVIP SSgA International Index (SAL5) – EX/CO
- LVIP SSgA S&P 500 Index (SA27) – EX/CO
- LVIP Templeton Growth (SA62)
- LVIP T. Rowe Price Growth Stock (SA29)
- LVIP Wilshire 2010 Profile (SAL1) – EX
- LVIP Wilshire 2020 Profile (SAL2) – EX
- LVIP Wilshire 2030 Profile (SAL3) – EX
- LVIP Wilshire 2040 Profile (SAL4) – EX
- MFS® VIT Utilities (SA67)
- SSgA Russell 1000 Growth Index (SAL9) – EX/CO
- SSgA Russell 1000 Value Index (SAL8) – EX/CO
- SSgA Russell Small Cap Value Index (SALB) – EX/CO
- SSgA S&P MidCap Index (SALA) – EX/CO
- Value Equity (SA28)

Aggressive

- AllianceBernstein VPS Global Thematic Growth (SA31)
- American Funds SMALLCAP World (SA46)
- BlackRock Aurora (SA75)
- BlackRock Energy & Resources (SA77)
- BlackRock Small/Mid-Cap Growth (SA76)
- Delaware VIP Emerging Markets (SA94) – EX/CO
- Fidelity VIP Mid Cap (SA84)
- FTVIPT Franklin Small-Mid Cap Growth Securities (SA63)
- Janus Aspen Enterprise (SA64)
- LVIP Baron Growth Opportunities (SA1X)
- LVIP SSgA Small-Cap Index (SA36) – EX/CO
- Medium Capitalization Equity (SA17) – EX/CO
- MFS® VIT Growth (SA65)
- Small Capitalization Equity (SA24) – EX
- SSgA Russell Small Cap Growth Index (SALC) – EX/CO

100% = Total

Section 5: Provide shipping address

Give street address – NO deliveries are made to a P.O. Box. Kits are sent via our vendor's "best way."

Company name _____ Phone _____ - _____ - _____

Contact name _____

Address _____

City _____ State _____ Zip _____

Special instructions _____



Lincoln Financial Group
 1300 S. Clinton Street, Suite 500
 P.O. Box 2248
 Fort Wayne, IN 46801-2248
 Phone 800 248-0838
 Fax 260 455-0200

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