

## ENROLLMENT KIT ORDER FORM

**Important:** Please complete this form in its entirety to request enrollment kits with the investment lineup effective August 22, 2011 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 for existing contracts, EM60812-DL DL.

### 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

- **Roth:**  Yes  No

- **QDIA selected?**  Yes  No

If yes, which QDIA?  Managed Account Option (*Stadion*) Life Cycle Options (*LVIP Protected Profiles: SAL1, SAL2, SAL3, SAL4, SALL*) Balanced Options:

\_\_\_\_\_ SA95 LVIP Delaware Foundation® Conservative Allocation

\_\_\_\_\_ SA96 LVIP Delaware Foundation® Moderate Allocation

\_\_\_\_\_ SA97 LVIP Delaware Foundation® Aggressive Allocation

- **Service provider information** TPA name \_\_\_\_\_

### SECTION 2: OPTIONS AND QUANTITIES

- **Customized enrollment materials\*\*** English QTY: \_\_\_\_\_ Spanish QTY: \_\_\_\_\_  
(Complete section 3 & 4 – May include Financial Advisor name and phone on kit)

- **Additional materials:**

 Participant rollover forms\* QTY: \_\_\_\_\_ Stadion participant choice kits\*  
(Not for use with plans that have Stadion as a QDIA) QTY: \_\_\_\_\_

- **Educational materials:** Additional participant materials, including Spanish materials, which do not contain time-sensitive or plan-specific information, can be ordered at no charge with UPS Ground Shipping via our web site at [www.LincolnFinancial.com](http://www.LincolnFinancial.com) or through our sales desk.

\*Only available in English

\*\*Available in both Spanish and English

### 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 that are check marked in the following list for a custom lineup: (If Stadion Account Management Services are offered, a custom lineup cannot be selected.)

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

**Conservative**

- Guaranteed Account/Guaranteed Stable Value Account\* - EX/CO
- SA14 LVIP Money Market - EX/CO

**Moderate Conservative**

- SA92 American Century VP Inflation Protection - EX
- SA1C American Funds American High-Income Trust<sup>SM</sup>
- SA1E American Funds Bond Fund of America<sup>SM</sup>
- SA12 Delaware Corporate Bond
- SA93 Delaware VIP<sup>®</sup> Diversified Income
- SA20 Delaware VIP<sup>®</sup> High Yield - EX
- SA87 Delaware VIP<sup>®</sup> Limited-Term Diversified Income
- SA86 FTVIPT Templeton Global Bond Securities
- SAL6 LVIP SSgA Bond Index - EX/CO
- SALM PIMCO Total Return - EX

**Moderate**

- SA80 BlackRock Large Cap Value
- SA61 Delaware VIP<sup>®</sup> Value
- SA57 Fidelity<sup>®</sup> VIP Equity Income
- SAL1 LVIP Protected Profile 2010 - EX
- SAL2 LVIP Protected Profile 2020 - EX
- SAL3 LVIP Protected Profile 2030 - EX
- SAL4 LVIP Protected Profile 2040 - EX
- SALL LVIP Protected Profile 2050 - EX
- SA97 LVIP Delaware Foundation<sup>®</sup> Aggressive Allocation - EX/CO
- SA95 LVIP Delaware Foundation<sup>®</sup> Conservative Allocation - EX/CO
- SA96 LVIP Delaware Foundation<sup>®</sup> Moderate Allocation - EX/CO
- SA28 LVIP MFS Value - EX
- SAL8 SSgA Russell Large Cap Value<sup>®</sup> Index Non-Lending Series - EX/CO

**Moderate Aggressive**

- SA39 AllianceBernstein VPS Small/Mid Cap Value
- SA54 American Funds EuroPacific Growth Fund<sup>®</sup> - EX
- SA48 American Funds Growth Fund of America<sup>®</sup>
- SA49 American Funds Investment Company of America<sup>®</sup> - EX
- SA34 American Funds New Perspective Fund<sup>®</sup>
- SA81 BlackRock Capital Appreciation - EX
- SA83 BlackRock Mid-Cap Value Equity
- SA56 Delaware VIP<sup>®</sup> Small Cap Value
- SA23 Delaware VIP<sup>®</sup> U.S. Growth
- SA35 Fidelity<sup>®</sup> VIP Contrafund<sup>®</sup>

**Moderate Aggressive (cont.)**

- SA58 Fidelity<sup>®</sup> VIP Growth
- SA70 Janus Aspen Janus
- SA55 LVIP Cohen & Steers Global Real Estate - EX
- SA11 LVIP Delaware Growth and Income
- SA33 LVIP Delaware Social Awareness
- SAL7 LVIP Delaware Special Opportunities - EX
- SA38 LVIP Mid-Cap Value
- SA22 LVIP Mondrian International Value - EX
- SAL5 LVIP SSgA International Index
- SA27 LVIP SSgA S&P 500 Index - EX/CO
- SA29 LVIP T. Rowe Price Growth Stock
- SA62 LVIP Templeton Growth
- SA19 LVIP Vanguard Domestic Equity ETF
- SA59 LVIP Vanguard International Equity ETF - EX/CO
- SA67 MFS<sup>®</sup> VIT Utilities
- SAL9 SSgA Russell Large Cap Growth<sup>®</sup> Index Non-Lending Series - EX/CO
- SALB SSgA Russell Small Cap Value Index Non-Lending Series - EX/CO
- SALA SSgA S&P MidCap<sup>®</sup> Index Non-Lending Series - EX/CO

**Aggressive**

- SA31 AllianceBernstein VPS Global Thematic Growth
- SA46 American Funds SMALLCAP World Fund<sup>®</sup>
- SA77 BlackRock Energy & Resources
- SA76 BlackRock Small/Mid-Cap Growth
- SA94 Delaware VIP<sup>®</sup> Emerging Markets - EX
- SA24 Delaware VIP<sup>®</sup> Smid Cap Growth
- SA84 Fidelity<sup>®</sup> VIP Mid Cap
- SA64 Janus Aspen Enterprise
- SA1X LVIP Baron Growth Opportunities
- SA36 LVIP SSgA Small-Cap Index - EX/CO
- SA17 LVIP T. Rowe Price Structured Mid-Cap Growth - EX
- SA65 MFS<sup>®</sup> VIT Growth
- SALC SSgA Russell Small Cap Growth Index Non-Lending Series - EX/CO
- SA63 Wells Fargo Advantage<sup>®</sup> Discovery

**100% = Total**

\*There are restrictions on the amount that can be withdrawn from the Guaranteed Account in a 12-month period. Transfers from the Guaranteed Stable Value Account may be subject to a 90-day equity wash. A market value adjustment may apply. Contact Lincoln Life & Annuity Company of New York at 800 248-0838 for further information.

**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 Life & Annuity Company of New York  
 1300 South 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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