

# Qualified Default Investment Alternative (QDIA) selection form

**For use with:**  
Lincoln American Legacy Retirement®  
Lincoln American Legacy Retirement®  
in the State of New York

**Important:** Listed below are the options within the Lincoln American Legacy Retirement® Group Variable Annuity Contract that the Lincoln Financial Group believes meet the criteria to be selected as a Qualified Default Investment Alternative (QDIA), subject to the plan fiduciary's decision. Complete and return this form if you want to change your plan's current default investment option to one of the Balanced or Life Cycle QDIA's.

**Please select one of the boxes listed below:**

**If you elected the Lincoln Ibbotson Insight Series investment lineup, please choose from one of the asterisked options.**

<b>Balanced options:</b>	<input type="checkbox"/> SA1B American Funds American Balanced Fund® <input type="checkbox"/> SA1F American Funds Capital Income Builder® <input type="checkbox"/> SA1L American Funds Income Fund of America® <input type="checkbox"/> SA2I FTVIPT Franklin Income Securities <input type="checkbox"/> SA2L LVIP Delaware Foundation® Conservative Allocation* <input type="checkbox"/> SA2M LVIP Delaware Foundation® Moderate Allocation* <input type="checkbox"/> SA2N LVIP Delaware Foundation® Aggressive Allocation* <input type="checkbox"/> SA2R MFS® VIT Total Return
<b>Life Cycle options:</b> (Discuss with your Account Manager before selecting this option)	<input type="checkbox"/> Wilshire Target Maturity Profiles: SA2W LVIP Wilshire 2010 Profile** – birth year before 1947 SA2X LVIP Wilshire 2020 Profile** – birth year 1947-1957 SA2Y LVIP Wilshire 2030 Profile** – birth year 1958-1967 SA2Z LVIP Wilshire 2040 Profile** – birth year 1968 and after – The LVIP Wilshire Profile will be selected based on each participant's year of birth.

\*These investment options are available with the Lincoln Ibbotson Insight Series Core and Expanded lineups.  
\*\*These investment options are only available with the Lincoln Ibbotson Insight Series Expanded lineup.

**Select one:**

- ☐ **Option 1:** Change the plan's default option to the QDIA selected above. The selected QDIA will apply to any new participants that have not made an investment election. **FAX form to 260 455-5984.**
- ☐ **Option 2:** Change the plan's default option to the QDIA selected above. The selected QDIA will apply to any new participants that have not made an investment election. Future investment elections for all participants that are fully (100%) invested in the plan's current default option will be changed to the new QDIA. The existing balances for these participants will remain in the current default account. **Contact your Account Manager at 800 248-0838 before sending.**
- ☐ **Option 3:** Change the plan's default option to the QDIA selected above. The selected QDIA will apply to any new participants that have not made an investment election. Future investment elections for all participants that are fully (100%) invested in the plan's current default option will be changed to the new QDIA. In addition, the existing balances for these participants will also be moved to the new QDIA. **Contact your Account Manager at 800 248-0838 before sending.**

**Reminder:** As required by the DOL, an initial and annual notice must be provided to affected participants (those with defaulted investments) by the plan sponsor. In order to receive fiduciary protection for defaulted assets, the plan sponsor must provide notices at least 30 days before initial investment into the QDIA and at least 30 days before the plan year beginning. Sample notices for each QDIA investment option can be downloaded at [www.LincolnFinancial.com](http://www.LincolnFinancial.com).

Plan name \_\_\_\_\_ Plan ID/Contract # \_\_\_\_\_  
Trustee/Plan  
Sponsor Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_  
E-mail \_\_\_\_\_ Phone \_\_\_\_-\_\_\_\_-\_\_\_\_

**Please return this form to Lincoln Financial Group:**

**Mailing address:** PO Box 2248  
Fort Wayne, IN 46801-2248

**Overnight address:** 1300 S. Clinton Street, Suite 500  
Fort Wayne, IN 46802

The Lincoln Ibbotson Insight Series is not an investment option. It is a fund lineup chosen by Ibbotson and Associates from the investment options that are available in the Lincoln American Legacy Retirement® group variable annuity. Ibbotson Associates, Inc. is a registered investment advisor and a wholly-owned subsidiary of Morningstar, Inc. Neither Ibbotson nor Morningstar are affiliated with the Lincoln Financial Group. The Ibbotson name is a registered mark of Morningstar, Inc. Ibbotson Associates, Inc., 22 W. Washington Street, Chicago, IL 60602.  
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