



## **Onboarding Timeline**

For new startup Length of Service Award Program (LOSAP) plans

The following is a timeline of the onboarding process for new startup plans that have elected the *Lincoln Alliance®* program and are serviced by a third party administrator (TPA). Week 1 begins once the financial professional has submitted a signed authorization form to Lincoln.

## Here's an overview of what you can expect:

Pre- implementation Week 1	<ul> <li>Lincoln representative provides completed HeroPlus<sup>SM</sup> input document to implementation partner (IP) to begin preparing documents.</li> </ul>
Pre- implementation Week 3	All documents are prepared and sent to Lincoln representative for delivery to client for signature.
Week 1	<ul> <li>Lincoln representative provides to IP completed and signed ACH form, Authorization form, Stable Value application, Plan Highlights, Rabbi Trust, Certificate of Authorized Representatives, Morningstar Combined Agreement, and Service Agreement.</li> <li>Lincoln representative provides Investment Policy Statement, Morningstar form ADV, and administration manual to plan sponsor.</li> <li>IP confirms these forms are in good order. If not, the timeline may need to be extended.</li> </ul>
Week 2	<ul> <li>IP conducts welcome call with the plan sponsor/TPA.</li> <li>System/website setup begins.</li> </ul>
Week 3	Contribution/census call is conducted with plan sponsor/TPA.
Week 4	<ul> <li>Web access is set up for plan sponsor, TPA, and financial professional.</li> <li>Distribution forms are prepared and sent to plan sponsor/TPA.</li> <li>Stable Value Contract is sent to plan sponsor.</li> </ul>
Week 5	Plan goes live. Participants may access accounts and request transaction and allocation changes.

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