

# Onboarding Timeline

## For Length of Service Award Program (LOSAP) plans with takeover assets

The following is a timeline of the onboarding process for plans with takeover assets that have elected the *Lincoln Alliance*<sup>®</sup> 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 style="list-style-type: none"> <li>Lincoln representative provides completed <b>HeroPlus</b><sup>SM</sup> input document to implementation partner (IP) to begin preparing documents.</li> </ul>
Pre-implementation Week 3	<ul style="list-style-type: none"> <li>All documents are prepared and sent to Lincoln representative for delivery to client for signature.</li> </ul>
Week 1	<ul style="list-style-type: none"> <li>Lincoln representative provides to Implementation Partner (IP) completed and signed ACH form, Authorization form, Stable Value application, Plan Highlights, Rabbi Trust, Certificate of Authorized Representatives, Morningstar Combined Agreement, Service Agreement, and copy of Termination Letter to Prior Record Keeper (PRK).</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 style="list-style-type: none"> <li>IP conducts welcome call with the plan sponsor/TPA.</li> <li>IP confirms termination letter has been sent to PRK.</li> <li>Conference call is conducted with PRK for conversion details and liquidation dates.</li> <li>System/website setup begins.</li> </ul>
Week 3	<ul style="list-style-type: none"> <li>Contribution/census call is conducted with plan sponsor/TPA.</li> </ul>
Week 4	<ul style="list-style-type: none"> <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	<ul style="list-style-type: none"> <li>Plan goes live and plan assets are transferred to Lincoln.</li> </ul>
Post-implementation	<ul style="list-style-type: none"> <li>Lincoln receives asset breakdown and allocation.</li> <li>Participants may access accounts and request transaction and allocation changes.</li> </ul>