

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 advisor 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"> Lincoln representative provides completed HeroPlus™ input document to implementation partner (IP) to begin preparing documents.
Pre-implementation Week 3	<ul style="list-style-type: none"> All documents are prepared and sent to Lincoln representative for delivery to client for signature.
Week 1	<ul style="list-style-type: none"> 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. Lincoln representative provides Investment Policy Statement, Morningstar form ADV, and administration manual to plan sponsor. IP confirms these forms are in good order. If not, the timeline may need to be extended.
Week 2	<ul style="list-style-type: none"> IP conducts welcome call with the plan sponsor/TPA. System/website setup begins.
Week 3	<ul style="list-style-type: none"> Contribution/census call is conducted with plan sponsor/TPA.
Week 4	<ul style="list-style-type: none"> Web access is set up for plan sponsor, TPA, and advisor. Distribution forms are prepared and sent to plan sponsor/TPA. Stable Value Contract is sent to plan sponsor.
Week 5	<ul style="list-style-type: none"> Plan goes live. Participants may access accounts and request transaction and allocation changes.