



For use with:
Lincoln Alliance® program



HeroPlusSM input document

Instructions Lincoln Retirement Services Company, LLC (LRSC) will use the information below to begin the implementation process for your retirement plan(s).

Plan sponsor information

Legal plan name _____

Legal employer name (as it would appear on a tax return) _____

Address _____

City _____ State _____ Zip _____

Contact name _____ Title _____

Email _____ Phone _____ - _____ - _____

Payroll contact name (if different than Contact Name) _____

Payroll contact email _____ Payroll contact phone _____ - _____ - _____

Employer ID (EIN) (9-digit) _____

Authorized document signer (if different than Contact Name) _____

Prior investment provider information (complete this section for existing plans only)

Prior investment provider name _____

Contact name _____

Email _____ Phone _____ - _____ - _____

How are assets currently being held? Group plan Individual accounts Other _____

Amount of outside assets (if applicable) _____

Service provider/TPA firm information (complete this section for TPA-serviced plans only)

VFIS PENFLEX Other _____

Financial representative information (complete this section only if a financial representative is involved)

Financial representative name _____

Address _____

City _____ State _____ Zip _____

Email _____ Phone _____ - _____ - _____

Role/paid as? RIA Broker-dealer Advisor

Branch ID _____ Territory code _____ Financial advisor number _____

Identify commission split name and bps (if applicable) _____

Mutual funds in the Lincoln Alliance® program are sold by prospectus. An investor should carefully consider the investment objectives, risks, and charges and expenses of the investment company before investing. The prospectus and, if available, the summary prospectus contains this and other important information and should be read carefully before investing or sending money. Investment values will fluctuate with changes in market conditions, so that upon withdrawal, your investment may be worth more or less than the amount originally invested. Prospectuses for any of the mutual funds in the Lincoln Alliance® program are available at 800-234-3500.

The program includes certain services provided by Lincoln Financial Advisors Corp. (LFA), a broker-dealer (member FINRA) and an affiliate of Lincoln Financial Group, 1300 S. Clinton St., Fort Wayne, IN 46802. Unaffiliated broker-dealers also may provide services to customers.

Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates. Affiliates are separately responsible for their own financial and contractual obligations.