Hey, teammate.

For commitment, not competition:

Think Lincoln.

The retirement plan industry is a relationship business. And with so many recordkeepers and options to choose from, it's essential to have partners who are **invested in your success** — that's why Lincoln prioritizes what's most important to you.

Your growth

Your Lincoln rep offers consultative support at the level you want, helping you expand your business on your terms.

- Mine your book
- Capture rollover opportunities
- Maximize plan health

Our goal is to help you optimize your growth because that's what partners are for.

Your confidence

Lincoln is **100%** financial professional-sold.

That means you and your clients come first.

We align with your needs and strategy, complementing – not competing with – your business.

Your relationships

Your clients are yours. Lincoln respects the connections you've worked hard to build, and when you bring those clients' retirement plans to us, we never stop working to earn your trust.

Our dedicated service has earned

- 96% Satisfaction rate for implementation[1]
- 92% Overall satisfaction[2]
- 95% Retention rate[3]

among plan sponsors

Your Lincoln team stacks hands to keep your clients happy – and help make you look good.

Let's achieve big goals – together.

Partnering with purpose

Here's a closer look at the benefits of your collaboration with Lincoln.

Your growth

The more support, expertise and tools you have, the easier it is to get out there and grow. As our partner, you have access to all our resources. Your Lincoln rep will:

- Help you mine your book and find new clients in all aspects of your business
- Help you capture rollover opportunities
- Benchmark current and prospective plans
- Bring forward industry-leading tools and services that may result in healthy plans and increased revenues for you
- Join you in plan sponsor meetings
- Collaborate with an existing TPA or connect you to one in our network

Your relationships

Once you and your clients are working with us, we help make the retirement plan experience easy — so you can spend more time driving profitable revenue.

- You and your clients have a single point of contact — one email, one number to call.
- Our people — relationship managers, account managers, implementation partners and retirement consultants — have a passion for their fields, for collaborating with you and for being proactive when managing your client's plan.
- Contribution rates are 77% higher when participants use our simplified web tools along with hands-on support from our team.[4]

Your confidence

Trust is everything, especially when it comes to your livelihood. That's why Lincoln works by your side — for you, with you. We don't provide participants with guidance on distributions from the plan. Instead, we're an extension of your business that complements and supports all the ways you want to work with your clients.

Think Lincoln.

To learn more about how we can team up, contact your Lincoln representative or call 877-533-9710.

Not a deposit
Not FDIC-insured
Not insured by any federal government agency
Not guaranteed by any bank or savings association
May go down in value

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Lincoln Financial Group®

[1] Lincoln Financial Group, "RPS Advisor Feedback Survey: Implementation Process," Fiscal Year 2022.

[2] Lincoln Financial Group, "Retirement Plan Customer Satisfaction Survey," 4Q 2021.

[3] Lincoln Financial Group. Retention rate information refers to total book of business, 4Q 2022.

[4] Lincoln Financial Group Production Data, 4Q 2022.