

Investing in your success

Plan sponsors | Partners | Individuals | Communities

Going above and beyond **in service to you** is **our way of life**. Here's what we do every day to **prove** our **commitment to you and your outcomes**, **partner with your financial professional**, and **build your confidence** in Lincoln.

Lead with strength, expertise and purpose



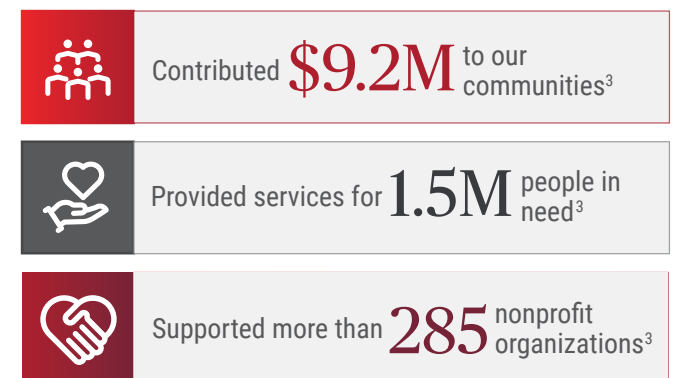
Make a meaningful impact

We operate with integrity



and we empower our communities

Lincoln Financial Foundation:



Take a personalized — and personal — approach to service

Our dedicated service has earned Lincoln these ratings among plan sponsors:

98% > Satisfaction rate for implementation⁴

92% > Overall satisfaction⁵

95% > Retention rate⁶

☆
10 years
running

Pensions & Investments
(P&I) Eddy Award recipient
for Excellence in Employee
Communications⁷

☆
8 years of
recognition

over the past decade,
Plan Sponsor Council of
America (PSCA) Signature
Award for Excellence⁸

Encourage positive, measurable retirement results

Contribution rates are



higher when participants use our simplified web tools along with hands-on support from our team.⁹



of participants meet or exceed the company match when they meet with a retirement consultant.¹⁰

Web-engaged users have a



higher deferral rate than non-web users.¹¹



16-time winner over the past decade, **DALBAR web communications seals**, plan sponsor and plan participant sites¹²

Deliver retirement solutions for a spectrum of diverse needs, for plans of all sizes

- ✓ 401(k)
- ✓ 403(b)
- ✓ 457(b)
- ✓ Group retirement plans and programs
- ✓ Cash balance plans, pooled accounts, self-directed brokerage accounts



To learn more about Lincoln's commitment to service, excellence and retirement plan success:

Financial professionals, call us at **877-533-9710**. Plan sponsors and business owners, talk to your financial professional.

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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[LincolnFinancial.com](https://www.lincolffinancial.com)

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¹ Lincoln Financial Book of Business, 3Q 2023.

² Lincoln Financial Group, as of 2Q 2023, <https://www.lincolffinancial.com/pbl-static/pdf/IR---Earnings-2Q2023-Conference---statistical-supplement---PDF.pdf>

³ Lincoln Financial Group 2022 Corporate Social Responsibility Report, <https://www.lincolffinancial.com/pbl-static/pdf/Corp-Responsibility---CSR-Report-2022---PDF.pdf>

⁴ Lincoln Financial Group, "Retirement Plan Services Post-Implementation Survey Scores," January through December 2022.

⁵ Lincoln Financial Group, "Retirement Plan Customer Satisfaction Survey," 4Q 2021.

⁶ Lincoln Financial Group. Retention rate information refers to total book of business, 4Q 2022.

⁷ <https://www.pionline.com/topic/eddy-awards>

⁸ <https://www.psc.org/industry-intel/signature-awards>

⁹ Lincoln Financial Group Production Data, Q3 2023.

¹⁰ Lincoln Financial Group plan data, 2Q 2022.

¹¹ Lincoln Financial Book of Business, 3Q 2023 production data.

¹² <https://www.dalbar.com/Awards/Winners/174>

2023 NAPA Advisor's Choice Award for Top Recordkeepers, Mega Market Plans (>\$250 million): Plan Sponsor Website, Wellness, Retirement Income, and Regulatory Support categories. <https://www.napa-net.org/2023-advisors-choice-mega-market-plans>

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