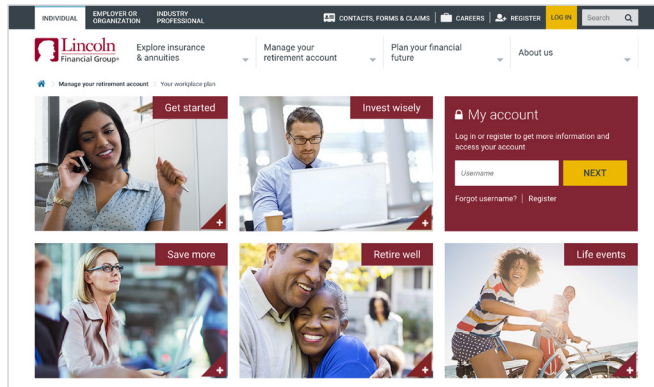


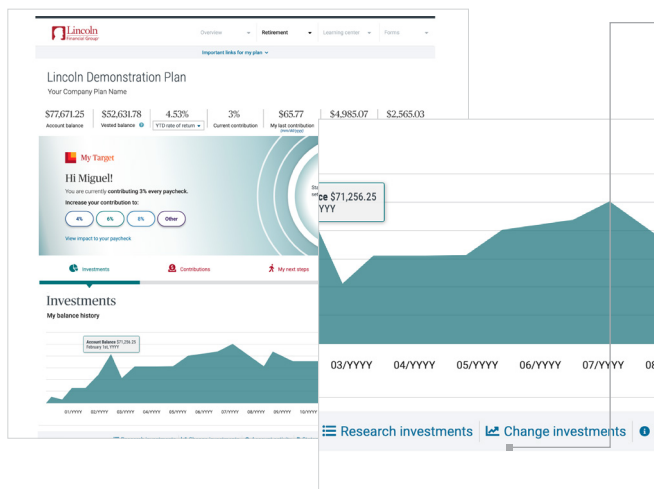
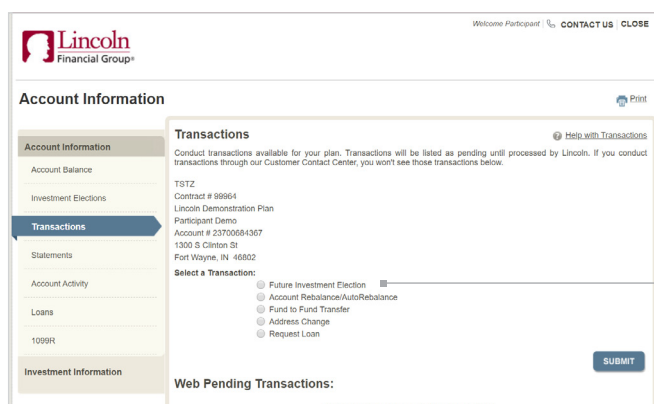
Changing your investments

Your online account at LincolnFinancial.com/Retirement makes it easy to change your retirement plan investments. This guide walks you through the process.



Start on the Transaction page

1. Visit LincolnFinancial.com/Retirement and log in to your account. (If you don't have an online account, click **Register** in the **My account** box. Select **Individual** and then **Employer Retirement Plan** or **Mutual Fund IRA**. Follow the prompts to register.)
2. If you have more than one Lincoln plan, select a plan name from the summary page to view the chosen account.
3. Select **Change investments** on the **Investments** tab.
4. You'll be brought to the Transaction home page where you'll have several options.
 - Future Investment Election changes how new money is allocated
 - Account Rebalance/Auto Rebalance shifts your current account value to different investments to help maintain your desired risk tolerance
 - Fund to Fund Transfer moves current dollars from a single source fund (not an all-in-one portfolio) to a new fund.

Change future investments

1. To change how your future contributions are invested, select **Future Investment Election** and click **SUBMIT**.

Lincoln Financial Group

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Future Investment Elections

Change the investment allocation of future contributions to your account.

TSTZ
Contract # 99964
Lincoln Demonstration Plan
Participant Demo
Account # 23700684367
1300 S Clinton St
Fort Wayne, IN 46802

As of 05/28/2020

Investment Style Explanation

Fund Name	Curr. Election	New Election
VGTARGET.BEL INC INV SABM	0%	
VGTARGET RET 2060 INV SABL	0%	

2. Enter your preferred investment percentages you want for the investments and click **SUBMIT**. Make sure the percentages add up to 100%.

Review your choices and click **SUBMIT** to confirm.

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Transactions

Conduct transactions available for your plan. Transactions will be listed as pending until processed by Lincoln. If you conduct transactions through our Customer Contact Center, you won't see those transactions below.

TSTZ
Contract # 99964
Lincoln Demonstration Plan
Participant Demo
Account # 23700684367
1300 S Clinton St
Fort Wayne, IN 46802

Select a Transaction:

- ☐ Future Investment Election
- ☒ Account Rebalance/AutoRebalance
- ☐ Fund to Fund Transfer
- ☐ Address Change
- ☐ Request Loan

Web Pending Transactions:

You currently have no pending transactions.

SUBMIT

Change current investments

Rebalancing option

1. To change your current investments, select **Account Rebalance/AutoRebalance** and click **SUBMIT**.
2. Enter your preferred investment percentages you want for the investments. Make sure the percentages add up to 100%.
3. Choose a rebalancing option. Set up a one-time or recurring transaction that will reset your selected asset allocation. Over time, your asset allocation, or the desired percentages of different assets, may shift because assets perform differently. AutoRebalance periodically adjusts your asset allocation to the percentages specified during this transaction.

To change your current investments only, choose **Rebalance Only**. If you want to opt in to AutoRebalance, choose **Rebalance and AutoRebalance**. Click **SUBMIT**.

On the confirmation screen, verify your choices and click **SUBMIT**.

Total (Whole percentages; must be equal to 100%)	0%
<input checked="" type="radio"/> Rebalance Only	
<input type="radio"/> Rebalance and AutoRebalance	
<input type="radio"/> AutoRebalance Only	
<input type="radio"/> Turn off AutoRebalance	

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Transfer Funds

TSTZ
Contract # 99964
Lincoln Demonstration Plan
Participant Demo
Account # 23700684367
1300 S Clinton St
Fort Wayne, IN 46802

Select a Fund to Transfer From

As of Thursday, May 28, 2020

Fund	Available Balance	Balance
<input type="radio"/> AmerFunds AmerBal SAGB		\$2,059.81
<input type="radio"/> AmerFunds Int Grw&Inc SAGF		\$1,734.68
<input type="radio"/> LPLAIS Sm Cr VBI Int Inst SA/M		\$9,415.46
<input type="radio"/> VIG Target Ret 2040 Inv SAGF		\$9,821.27
<input type="radio"/> Fed Gov Ultrashort Duration SACZ		\$0,543.90
<input type="radio"/> Guaranteed State Vol	\$6,358.43*	\$6,358.43

Select Type and Amount of Transfer

☐ Full Transfer

☐ Partial Transfer (in dollars) Amount:

☐ Partial Transfer (in percent)

CANCEL

NEXT

Fund to fund transfer

1. To move money from one investment to another, select **Fund to Fund Transfer** and click **SUBMIT**.
2. Select the fund from which you want to remove money. Then select **Full Transfer** or **Partial Transfer**. If you select Partial Transfer, fill in the amount or percentage to transfer. Then click **NEXT**.
3. Enter the amount(s) you want to transfer to the new fund(s) and click **SUBMIT**.
4. Verify your choices and click **SUBMIT** to process the transaction.

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Investment Information

Transactions

Conduct transactions available for your plan. Transactions will be listed as pending until processed by Lincoln. If you conduct transactions through our Customer Contact Center, you won't see those transactions below.

TSTZ
Contract # 99964
Lincoln Demonstration Plan
Participant Demo
Account # 23700684367
1300 S Clinton St
Fort Wayne, IN 46802

Select a Transaction:

☐ Future Investment Election

☐ Account Rebalance/AutoRebalance

☐ Fund to Fund Transfer (**1 pending**)

☐ Address Change

☐ Request Loan

SUBMIT

Web Pending Transactions:

Type**	Fund Name	Value	Date	Time	Status
<input type="checkbox"/> ▶ Transfer	AmerFunds AmerBal SAGB	50%	05-29-2020	17:07	Pending

CANCEL

Cancel a transaction

1. View pending and canceled transactions on the main Transactions page.
2. Click the transaction to view details. To cancel, select the box next to the transaction you'd like to cancel, then click **CANCEL**. Click **OK** in the confirmation box to finish canceling the transaction.



If you have questions or need help, call our Customer Contact Center at 800-510-4015, Monday through Friday, between 8:00 a.m. and 8:00 p.m. Eastern.

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/Retirement](https://lincolnfinancial.com/Retirement)

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PDF 12/21 **Z02**

Order code: DIR-TFDIR-FLI001



All screen shots are for illustrative purposes only, and the actual screens on the website may be different.

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