

Form Manifest

Source	Form Number	Form Name	Description	Population Status
DEMODIST	PRV-001	Privacy Notice		formatted form rendered
DEMODIST	Disc-001	Disclosure Form		formatted form rendered
DEMOCARRIER	AN11650LV	i4Life Level Advantage Election Form		formatted form rendered
DEMOCARRIER	AN10697LV	Level Advantage Supplement		formatted form rendered
DEMOCARRIER	33611	i4Life Advantage Non-Natural Owner Form Level Adv		formatted form rendered
Count	5			

FACTS**WHAT DOES Aplifi
DO WITH YOUR PERSONAL INFORMATION?**

Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.

The types of personal information we collect and share depend on the product or service you have with us. This information can include:

- Social Security number and investment experience
- Assets and income
- Account balances and account transactions

When you are **no longer** our customer, we continue to share your information as described in this notice.

All financial companies need to share customer's personal information to run their everyday business. In the section below, we list the reasons financial companies can share their customer's personal information; the reasons Aplifi chooses to share; and whether you can limit this sharing.

Reasons a Bank Can Share Your Personal Information	Does Aplifi Share?	Can you limit this sharing?
For our everyday business purposes— such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes— to offer our products and services to you	Yes	No
For joint marketing with other financial companies	Yes	No
For our affiliates' everyday business purposes— information about your transactions and experiences	Yes	No
For our affiliates' everyday business purposes— information about your creditworthiness	No	No
For our affiliates to market to you	No	No
For non-affiliates to market to you	No	We don't share

Questions?

Call Aplifi - Demo Distributor

Who We Are**Who is providing this notice?**

See the Raymond James U.S. legal entities noted below.

Why It Matters**How does Raymond James protect my personal information?**

To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings.

How does Raymond James collect my personal information?

We collect your personal information, for example, when you

- open an account or perform transactions
- make a wire transfer or tell us where to send money
- tell us about your investment or retirement portfolio

We also collect your personal information from others, such as credit bureaus, affiliates and other companies.

Why can't I limit all sharing?

Federal law gives you the right to limit only

- sharing for affiliates' everyday business purposes—information about your creditworthiness
- affiliates from using your information to market to you
- sharing for non-affiliates to market to you

State laws and individual companies may give you additional rights to limit sharing. See below for more on your rights under state law.

Definitions**Affiliates**

Companies related by common ownership or control. They can be financial and non-financial companies.

- Our affiliates include companies with a Raymond James or an Eagle name.

Non-affiliates

Companies not related by common ownership or control. They can be financial and non-financial companies

- *Raymond James does not share with non-affiliates so they can market to you.*

Joint marketing

A formal agreement between non-affiliated financial companies that together market financial products or services to you.

- *Our joint marketing partners may include banks and credit unions.*

Other important information

Financial advisors ("FA") may change brokerage and/or investment advisory firms and nonpublic personal information collected by your FA may be provided by your FA to the new firm so your FA can continue to service your account(s) at the new firm. If you do not want your financial advisor to use or transfer this information, please call 800-647-7378 to opt out of this sharing. Opt-in states such as California and Vermont require your affirmative consent to share your nonpublic information with the FA's new firm, and in those states you must give your written consent before the FA can take your nonpublic information with him or her. You can withdraw this consent at any time by contacting 800-647-7378.

Raymond James U.S. legal entities

Raymond James U.S. legal entities that utilize the names: Raymond James Financial, Inc., Raymond James & Associates, Inc., Raymond James Financial Services, Inc., Raymond James Financial Service Advisors, Inc., Eagle Asset Management, Inc., Eagle Fund Distributors, Inc., Eagle Family of Funds, Eagle Fund Services, Inc., Raymond James Insurance Group, Inc., and Raymond James Trust, N.A. This notice does not apply to Raymond James Bank.

Annuity Disclosure Form

Demo Distributor
Service Center
Call 800-861-8908

0 2 4 3 1
Form #
Demo Distributor
Branch #

48824656
Account
0000436061
FA #
Speed Dial #

General Information

Agent Name: John Doe, Jimmy Doe Annuitant/Insured: Dan Smith
SS#: 111111111 DOB: 11/21/1966 Order #: IZ2-EBZI-BMH

Tax Qualified Disclosure

You are purchasing an annuity contract with funds from an Individual Retirement Account (IRA) or other tax-qualified retirement plan. You should be aware that the annuity, when used in an IRA or other tax-qualified retirement plan, does not provide any additional tax benefit beyond the tax-deferred treatment provided by the IRA or tax-qualified retirement plan itself. Annuities may have higher fees and expenses than those incurred with similar investments or with retirement plans alone. The costs and expenses of a variable annuity contract related to specific benefits and features are detailed in the contract and/or prospectus. Therefore, in considering whether or not to purchase such an annuity, only consider the annuity's other features, including the availability of lifetime payments, death benefit protection, as well as living benefits in some instances.

Client Acknowledgements

- I am fully aware if I sell or take a withdrawal from an annuity there may be tax consequences.
- I am fully aware of the cost, surrender charges and the new surrender period of this annuity.
- I am fully aware if I take a distribution prior to age 59½, additional tax penalties may apply.
- I am fully aware of the benefits chosen and they meet my current objectives and risk tolerance.
- I understand that utilizing withdrawal benefits can reduce or eliminate the contract payout upon death.
- I am fully aware the annuity sub-accounts may lose money (variable annuities only).
- I understand that some products offer more liquidity in return for higher internal contract charges while other products offer less liquidity and contain lower internal contract charges (variable annuities only).
- I have received a current prospectus (variable annuities only).
- I have read and understand the information above.

Client Signature	Client Name Printed	Date
Joint Client Signature	Joint Client Name Printed	Date

I certify that the Account Information and Client Agreement form on file for this client is current, and the objectives, financial information and the time horizon listed on the form are suitable for this investment.

Financial Advisor Signature	Branch Manager Signature	Date
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i4LIFE® Indexed Advantage Election
Lincoln Level AdvantageSM
Minimum \$50,000

The Lincoln National Life Insurance Company ("Company")
 Lincoln Life & Annuity Company of New York ("Company")
 First Class Mail: PO Box 2348, Fort Wayne, IN 46801
 Overnight Address: 1300 S Clinton St., Fort Wayne IN 46802
 Service Center: 877-534-4636
 Sales Desk: 877-533-0265 Fax Number: 260-455-2467

This form must be submitted with the *Lincoln Level AdvantageSM* contract application and is used to begin an *i4LIFE®* Indexed Advantage income stream immediately or within 11 months of the contract date.

Only Indexed Accounts with 1-year terms are available. If you elect *i4LIFE®* Indexed Advantage while you are currently allocated to an Indexed Account with a term greater than one year, the funds allocated to the Indexed Account(s) will be transferred to the LVIP PIMCO Low Duration Bond Fund at Interim Value unless you provide instructions otherwise.

Contract Owner Information - If non-natural owner complete form 33611.

Contract Number (if available): _____

Contract Owner's Name: Dan Smith

Social Security Number (last four digits only, if the contract number is included): _____

Annuitant Information - Complete only if Annuitant is not the Contract Owner.

Name: Dan Smith

Date of Birth: 11/21/1966 Male Female

Multi-Generational Income Stream (Non-Qualified only)

Secondary Life Information - Complete only if Joint Payout is elected.

Name (Must be Spouse for Qualified contracts): _____ Date of Birth: _____

Social Security Number: _____ Male Female

The role of the Secondary Life is solely for calculating the *i4LIFE®* payment. In the event of the death of the Annuitant, payments will continue to the Contract Owner(s) or Beneficiary(ies) based on the Secondary Life.

i4LIFE® Indexed Advantage Income

An *i4LIFE®* Indexed Advantage request received in good order by the 22nd of the current month will initiate an income payment on the 1st of the following month.

- Income Frequency: Monthly (default)
 Quarterly
 Semi-Annually
 Annually

Select Income Start Month: _____ Year: _____

(If no income start month is indicated payments will begin at the soonest possible date. Payment will be withdrawn on the 23rd of the month prior to the first of the next month.)

Note: The initial *i4LIFE®* payment must begin within 11 months of the issue date of the contract.

Access Period - Choose only **ONE** of the following options. (If no option is selected the default will apply.)

- Default (Minimum of 20 years or to age 90, whichever is greater)
 Maximum - (the maximum access period results in the lowest initial *i4LIFE®* payment)
 _____ Years (must be between the default above and up to age 115 for Non-Qualified contracts, and up to age 100 for Qualified contracts)

Important Tax Information

The IRS has issued guidance that affects your ability to take distributions from an annuity that is funded by a tax-free partial exchange from another contract. Generally, electing an *i4LIFE*® program will not affect the tax-free status of the exchange because the *i4LIFE*® election meets one of the exceptions under the guidance. However, if you take an unscheduled withdrawal from your *i4LIFE*® contract within 180 days of the exchange, the tax-free status of the exchange could be lost.

Understand that additional withdrawals or surrendering the contract may only occur during the Access Period and may have adverse tax consequences. You should consult your tax advisor to determine the tax implications of any withdrawal.

Once your withholding election is made, it will remain in effect unless the Company is notified of a change. You may change your election at any time. If you elect not to have federal income tax withheld, you will remain liable for payment of federal income tax on your distribution. You may also be subject to tax penalties under the estimated tax payments rules if your payment of estimated tax and withholding, if any, are not adequate. You may wish to discuss your withholding election with a qualified tax advisor.

Non-Qualified Federal Income Tax Withholding

Non-Qualified Withholding Options:

Select One: Do not withhold federal income tax

Withhold federal income tax based on the following exemptions:

A. Single with _____ allowances (if left blank, default will be married plus 3 allowances)

B. Married with _____ allowances (if left blank, default will be married plus 3 allowances)

C. Amount to be withheld in addition to specified exemptions \$ _____ (If option C is selected, option A or B must also be completed.)

Note: If tax withholding information is not provided, federal income tax and applicable state tax will be withheld using married and 3 allowances.

Qualified Federal Income Tax Withholding

Qualified Withholding Options:

Select One:

Do not withhold federal income tax

Withhold 10% federal income tax

Indicate the total percentage of federal income to be withheld _____ % (the amount must be greater than 10%)

State Income Tax Withholding Information

State of residence: Pennsylvania

Do not withhold state income tax

Withhold _____% state income tax based on **taxable portion of the gross distribution.**

Withhold \$ _____ state income tax

Note: Some states require their specific withholding form. State tax minimums will be automatically withheld if required.

Note: The dollar amount or percent withholding must meet the minimum withholding guidelines for your state. If tax information is not provided, federal tax and applicable state tax will be withheld using married and 3 allowances. (If no dollar amount or percentage is provided, we will withhold the minimum required by your state. If no withholding is required, no state tax will be withheld.)

Payment Options

Select One: **Checking** - MUST Attach a copy of a voided check or bank letter. **Savings Account** - MUST attach a bank letter.

Brokerage Account: Account Number _____

Payee Name: _____

Financial Institution's Name (Required): _____

Address of Financial Institution (if brokerage account): _____

(ATTACH VOIDED CHECK HERE)

Starter check and deposit slips are not accepted

*A PAPER CHECK WILL BE MAILED IN THE FOLLOWING CASES:

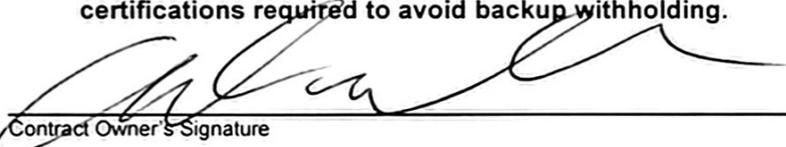
- If bank information is not provided
- If the electronic payment is unable to successfully process
- If a brokerage account does not accept electronic payments

Authorization and Signature

By signing below, you certify that you:

- Understand that if I/we are currently allocated to an Indexed Account with a term greater than one year, the funds allocated to the Indexed Account(s) will be transferred to the LVIP PIMCO Low Duration Bond Fund at Interim Value unless you provide instructions otherwise.
- Are electing *i4LIFE*® Indexed Advantage on your annuity contract and understand that there will be additional charges assessed to you for this election.
- Understand that by electing *i4LIFE*® Indexed Advantage, transfers to Indexed Account options to establish a new Segment with a term longer than one year is not permitted.
- Authorize the Company to deposit payments into the account(s) identified on this form by direct deposit. This authorization requires the financial institution(s) to be a member of the National Automated Clearing House Association (NACHA). You authorize the Company to initiate corrections, if necessary, to any amounts credited or debited to your account(s) in error.
- Authorize the direct deposits to remain in effect until your *i4LIFE*® Indexed Advantage income payments terminate or you notify the Company of a change in sufficient time to act. You agree to hold the Company harmless for any errors made by your financial institution(s), including the date funds are actually credited to your bank account(s).
- Understand that additional withdrawals or surrendering the contract may occur only during the Access Period and may have adverse tax consequences. Please consult a tax advisor.
- Understand the initial *i4LIFE*® Indexed Advantage payment is calculated based on the nearest birthdate of the covered life, or the nearest birthdate of the blended mortality of the two lives, if the joint option is chosen and the Assumed Investment Return used in determining payments is 3%.
- Understand that the Death Benefit is only available during the Access Period.
- Agree that all information provided on this form is accurate.
- **Tax Information:** Under penalties of perjury, the Owner(s) certifies that: (1) the Social Security Number(s) or Federal Tax Identification Number(s) provided for the Owner(s) is the correct number (or the Owner(s) is waiting for a number to be issued); and (2) the Owner(s) is not subject to backup withholding either because (a) the Owner(s) is exempt from backup withholding, or (b) the Owner(s) has not been notified by the Internal Revenue Service (IRS) that the Owner(s) is subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified the Owner(s) that he or she is no longer subject to backup withholding.

The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.


Contract Owner's Signature

2/4/26
Date

Joint Owner (if any) Signature

Date

Select ONE if allocating to an Indexed Account(s)

- IMMEDIATELY ALLOCATE WITH THE FIRST DEPOSIT.** You'll have a 7-day rate hold and only the first deposit will be allocated to the Indexed Account(s) in the first year.
- If you're making multiple deposits, or you don't expect the contract to be funded within the 7-day rate hold period consider the option below.
- WAIT 30 DAYS.** You'll have a 30-day rate hold and multiple deposits will go into a holding account and then allocated to the Indexed Account(s) on the 30th calendar day from when the application was received at our Home Office.
- Any deposits received within 30 calendar days are allocated to a non-interest bearing holding account (excluding any allocation(s) to a variable fund).
 - At the end of 30 days, the account value in the transfer account is allocated to the Indexed Account(s) selected.

If your contract is not funded by the 30th day, you'll automatically be allocated to the Indexed Account(s) selected when the first deposit is received, and no rate hold applies. You can then allocate any subsequent deposit(s) on the next indexed anniversary date.

Initial Investment Allocations

Fund Allocations for Level Advantage

50%	1-Year S&P 500 Cap, 20% Protection	25%	American Funds Asset Allocation Fund
25%	American Funds Growth Fund		

Portfolio Rebalancing Fund Allocations

Please see the last page for additional disclosures regarding the S&P 500®, Russell 2000®, MSCI EAFE and Capital Strength Index. Applicable Performance Caps are available on LincolnFinancial.com.

Authorization and Signature

I/We understand that there are charges and fees associated with the annuity contract and that there may be an additional charge for optional benefits provided through a rider/endorsement or amendment. I/We also understand that contingent deferred surrender charges may apply if I/we make a withdrawal, surrender the annuity contract or exchange it for another annuity contract prior to the expiration of any sales charge period.

By signing below, I/we the contract owner, certify that I/we understand and agree with the selections made. I/We understand the Asset Class, categories of fund allocations, are determined by The Lincoln National Life Insurance Company for illustrative purposes and is not considered investment advice.

I/We confirm the contract was principally negotiated, and will be issued and delivered in the state where the application was signed. Any communication pertaining to my/our contract also occurred in the state where the application was signed.

I/We acknowledge the indexed accounts and fund allocations chosen will be applicable on the contract effective date or 30 days after the application is received by Us if the contract has been funded. I/We understand that I/we can lose money on Indexed Accounts without 100% Protection.

I/We understand that any withdrawal, transfer, surrender, annuitization or payment of a death benefit from an Indexed Account during a term will be based on the Interim Value of each Segment, and the withdrawal will reduce the Indexed Crediting Base for each Segment proportionately by the amount that the withdrawal reduced the Interim Value.

By signing below, I/we understand I/we am/are applying for an index-linked variable annuity, and that the values of the policy may be determined by an external index, subject to a performance cap, participation rate or performance trigger rate. I/We understand that the indices used are price indices and do not reflect dividends paid on the underlying stocks. The level of the index may reflect the deduction of an annual fee. The policy does not directly participate in any stock or equity investments. I/We understand that any values shown, other than guaranteed minimum values, are not guarantees, promises or warranties.


Contract Owner's Signature

2/4/26
Date

Joint Contract Owner's Signature

Date

Annuitant's Signature

Date

Annuitant Relationship to Owner (Required)

Dealer Information

Option: Option B

I acknowledge that I am fully aware of, and abiding by, Lincoln Annuity Situs Guidelines. For a copy of Lincoln's Situs Guidelines please refer to form AN10595. I have reviewed and I understand Lincoln Financial Group's Position Regarding Marijuana-Related Businesses as published in form GB10877.

By providing my email address below, I elect to receive email alerts and notifications on the current account status and activity (not needed if authorization already given).

Registered Representative's Signature (Servicing Representative) _____ Split _____ 50 %

John Doe _____ Registered Representative's Name (Print as it appears on FINRA Licensing) _____ Registered Representative's Office Telephone _____

Registered Representative's Email Address _____ Registered Representative's Mobile Telephone _____

Jimmy Doe _____ Additional Registered Representative _____ Split _____ 50 %

Additional Registered Representative's Email Address _____ Additional Registered Representative's Mobile Telephone _____

Additional Registered Representative _____ Split _____ %

Additional Registered Representative's Email Address _____ Additional Registered Representative's Mobile Telephone _____

48824656 _____ Client Account Number at Dealer (if applicable)

Demo Distributor _____ Broker/Dealer Name _____

Branch Address _____

City _____ State _____ Zip _____

Branch Number _____ Registered Representative Number _____

S&P 500®

The S&P 500® Price Return Index is a product of S&P Dow Jones Indices LLC ("SPDJI"), and has been licensed for use by The Lincoln National Life Insurance Company. Standard & Poor's®, S&P® and S&P 500® are registered trademarks of Standard & Poor's Financial Services LLC ("S&P"); Dow Jones® is a registered trademark of Dow Jones Trademark Holdings LLC ("Dow Jones"); and these trademarks have been licensed for use by SPDJI and sublicensed for certain purposes by The Lincoln National Life Insurance Company. The Lincoln National Life Insurance Company's products are not sponsored, endorsed, sold or promoted by SPDJI, Dow Jones, S&P, their respective affiliates, and none of such parties make any representation regarding the advisability of investing in such products nor do they have any liability for any errors, omissions, or interruptions of the S&P 500® Index.

Russell 2000®

The Russell 2000® Price Return Index (the "Index") is a trademark of Frank Russell Company ("Russell") and has been licensed for use by The Lincoln National Life Insurance Company. The *Lincoln Level Advantage*™ Indexed Variable Annuity is not in any way sponsored, endorsed, sold or promoted by Russell or the London Stock Exchange Group companies ("LSEG") (together the "Licensor Parties") and none of the Licensor Parties make any claim, prediction, warranty or representation whatsoever, expressly or impliedly, either as to (i) the results to be obtained from the use of the Index (upon which the *Lincoln Level Advantage*™ Indexed Variable Annuity is based), (ii) the figure at which the Index is said to stand at any particular time on any particular day or otherwise, or (iii) the suitability of the Index for the purpose to which it is being put in connection with the *Lincoln Level Advantage*™ Indexed Variable Annuity. None of the Licensor Parties have provided or will provide any financial or investment advice or recommendation in relation to the Index to The Lincoln National Life Insurance Company or to its clients. The Index is calculated by Russell or its agent. None of the Licensor Parties shall be (a) liable (whether in negligence or otherwise) to any person for any error in the Index or (b) under any obligation to advise any person of any error therein.

MSCI EAFE

MSCI EAFE Price Return Index is an unmanaged index that measures the equity market performance of 22 developed market country indices located in Europe, Australasia, and the Far East. It is not available for direct investment. The Product referred to herein is not sponsored, endorsed or promoted by MSCI, and MSCI bears no liability with respect to any such Product or any index on which such Product is based. The Prospectus contains a more detailed description of the limited relationship MSCI has with The Lincoln National Life Insurance Company and any related funds.

Capital Strength Index™

Nasdaq® and the Capital Strength Net Fee Index™ are registered trademarks of NASDAQ, Inc. (which with its affiliates is referred to as the "Corporations") and are licensed for use by The Lincoln National Life Insurance Company. The Product(s) have not been passed on by the Corporations as to their legality or suitability. The Product(s) are not issued, endorsed, sold, or promoted by the Corporations. THE CORPORATIONS MAKE NO WARRANTIES AND BEAR NO LIABILITY WITH RESPECT TO THE PRODUCT(S). The level of the index may reflect the deduction of an annual fee. See prospectus for details.

NASDAQ -100 Index®

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The Lincoln National Life Insurance Company
Lincoln Life & Annuity Company of New York
Servicing Office - PO Box 2348
Fort Wayne In 46801-2348
Fax Number 260 455-2467
LincolnFinancial.com

Overnight Address: Lincoln Financial Group, Customer Service - IA
1300 S. Clinton St.
Fort Wayne, IN 46802

Contract Information

Lincoln Contract Number (if known): _____
Contract Owner's Name: Dan Smith
Address: 222 Valley Creek Blvd Ste 300
City: Exton State: PA Zip: 19341
Telephone Number: Daytime: (555)555-5555 Evening: _____

Important Information

By signing below, the Authorized Signors verify and agree as follows:

Corporations (For example: LLC, LLP, LP, FLP*)

Entity Name: _____
Identification Number: _____ If none, check here

1. i4LIFE® Advantage must be started within 12 months of annuity inception (including original contract if 1035 exchange).
2. The following options selected on the attached i4LIFE® Advantage election form are irrevocable.
 - Access Period
 - Payment Frequency
 - Payment mode must be LevelPay
3. If the annuity has existed for less than 12 months when i4LIFE® payments begin, the 10% IRS penalty will not apply to i4LIFE® income payments or other withdrawals.

Non-Grantor Irrevocable Trusts (For example: QTIP, Generation-Skipping, Bypass or Family Trust*)

Trust Name: _____
Trust Tax Identification Number: _____ If none, check here

1. i4LIFE® Advantage must be started within 12 months of annuity inception (including original contract if 1035 exchange).
2. The following options selected on the attached i4LIFE® Advantage election form are irrevocable.
 - Access Period
 - Payment Frequency
 - Payment mode must be LevelPay.

*These are common examples only

Revocable or Irrevocable Grantor Trusts or Intentionally Defective Grantor Trusts

(For example: RLT, GRAT, Medicaid*)

Grantor's Name: _____

Grantor's Social Security Number: _____ Date of Birth: _____

The trust listed above is a Grantor Trust under Section 671-679 of the Internal Revenue Code (IRC) the following will apply:

- If this trust has a Tax ID Number (TIN), any taxable distributions from this annuity to the trust will be reported to the trust and the Internal Revenue Service. If this trust does not have a TIN such distributions will be reported to the Grantor and the Internal Revenue Service.
- The trust is treated as a natural person under IRC Section 72 (u).
- If the Grantor is less than 59½ and the trust has been in an annuity for less than 12 months when *i4LIFE*® payments begin, the 10% IRS penalty will not apply to *i4LIFE*® income payments or other withdrawals. If the trust has been in an annuity longer than 12 months when *i4LIFE*® payments begin, the 10% penalty will not apply to regular income payments, but may apply to additional withdrawals until the later of 5 years of age 59½.
- If the trust should cease to be a Grantor Trust, the Trustee and/or Grantor will immediately give written notification, including new TIN, to the Lincoln Financial Group.

Authorized Signor Information

Trustee's Printed Name

Title

Authorized Signature

Date

Trustee's Printed Name

Title

Authorized Signature

Date

Trustee's Printed Name

Title

Authorized Signature

Date

Lincoln Financial Group® affiliates, their distributors, and their respective employees, representatives and/or insurance agents do not provide tax, accounting or legal advice. Clients should consult their own independent advisor as to any tax, accounting or legal statements made herein.