

Asset transfer request form

You may use this form to request (1) a contract exchange within a 403(b) plan, (2) a plan to plan transfer between 403(b) plans, (3) a transfer between 401(a), 401(k), 457(b) governmental plans or between 457(b) non-profit plans, or (4) a direct rollover to a 401(a), 401(k), 403(b) or 457(b) governmental plan.

1. Participant information

Name (first, MI, last, suffix) _____

Address _____

City _____ State _____ Zip _____

Email address _____

Social security number _____ - _____ - _____ Daytime phone number _____ - _____ - _____

Date of birth ____/____/____ (mm, dd, year) Evening phone number _____ - _____ - _____

Recipient employer/plan sponsor UW Tax-Sheltered Annuity (TSA) 403(b) Program

Actively employed with recipient employer/plan sponsor named above: Yes No

Is The Lincoln National Life Insurance Company (Lincoln) contract: New Existing Contract # _____

2. Releasing vendor* information

Previous employer/plan sponsor name UW Tax-Sheltered Annuity (TSA) 403(b) Program

If same as Section 1, check here

*Vendor refers to the investment provider.

Releasing vendor's name _____

Address _____

City _____ State _____ Zip _____

Contract # _____ Phone number _____ - _____ - _____

Is the employee fully vested? Yes No

3. Request instructions

You want to:

Request an asset transfer of the **full** value of this contract. Approximate value of account \$ _____
(Transfers in-kind are not acceptable. Securities should be liquidated, redeemed or sold.)

Request a **partial** asset transfer of this contract. Asset transfer value is \$ _____

Request an asset transfer via an annuity option. Choose frequency of payments:

Monthly Quarterly Semi-annually Annually

Indicate duration: _____ years _____ months

4. Plan information

FROM type of plan:

401(k) 401(a) IRA 457(b) Governmental Pension 457(b) Non-profit (Transfer only)

403(b)(1) annuity contract 403(b)(7) custodial account (Mutual fund)

TO type of plan:

403(b)(1) Annuity Contract 457(b) Governmental 401(k) 401(a)

457(b) Non-Profit (Transfer only)

5. Asset transfer information

(Select either direct rollover, contract exchange, plan to plan transfer or transfer. If you select direct rollover, check all that apply in section 5a. If you select either contract exchange, plan to plan transfer or transfer, indicate an amount in section 5b.)

- Direct rollover** (Employer and/or market has changed). (If you are rolling over employer accounts, no IRS qualifying event is required, refer to employer for eligibility.)
Under IRS regulations, a participant is only eligible to roll over employee deferrals and earnings for one of the reasons listed below.

5a. Rollover eligibility, please check all that apply:

- Age 59 ½ or older
 Death
 Qualified Domestic Relations Order (QDRO)
 In-service distribution of a Governmental 457(b) plan of \$5,000 or less
 Severance from employment
 Total and permanent disability
 Withdrawal of pre-1989 grandfathered value from a 403(b) plan

Note: Required minimum distributions, hardship withdrawals, substantially equal periodic payments and excess contributions are not eligible for rollover.

- Contract exchange** (403(b) to 403(b) only - Transfer from one contract to another within the same employer's plan and market is not changing)
A participant may request a **contract exchange** of his/her account with the **same** employer to a different funding vehicle without meeting a distribution event. However, based on the final 403(b) regulations, the funding vehicle must be approved by the plan administrator and an Information Sharing Agreement must be in place with the recipient vendor.

- Plan to plan transfer** (403(b) to 403(b) only - Transfer from one contract to another, but employee has changed employers and/or employers are related per plan documents)
A participant, who has a distribution event, may request a **plan to plan transfer** of his/her account to the **new** employer's plan. Both the prior employer and new employer must agree to this transfer.

- Transfer** (All markets except 403(b) plans - Transfer from one contract to another within the same employer's plan and market is not changing)

5b. Indicate the amount of the contract exchange, plan to plan transfer, or transfer:

Employee elective deferral	\$ _____	Employer matching contribution	\$ _____
Roth	\$ _____	Employer discretionary contribution	\$ _____
Other:	_____	\$ _____	

6. Agreement and signatures

Beginning September 25, 2007, final 403(b) regulations began imposing new rules for contract exchanges.

A contract exchange processed on or after that date may require that the employer enter into an Information Sharing Agreement by January 1, 2009, or agree to coordinate the information necessary to satisfy Section 403(b) before any future distribution or loan is made from the recipient investment/contract provider.

If your employer is not currently sending contributions to Lincoln, or if an Information Sharing Agreement is not currently in place, then Lincoln agrees to make a reasonable, good faith effort to contact the employer as required under Revenue Procedure 2007-71 before processing future distributions or loans.

Beginning January 1, 2009, Lincoln will not accept a contract exchange unless a completed Information Sharing Agreement, or equivalent, has been received.

The issuer and participant agree as follows:

- You recognize that by implementing this asset transfer, the participant's contract may be subject to the same or more stringent restrictions on distributions.
- Lincoln can only accept checks or money orders.
- The check or money order must be issued directly to The Lincoln National Life Insurance Company in payment of the designated value for the asset transfer from this account. Lincoln hereby accepts the asset transfer of assets requested above.

Checks should be mailed to:

The Lincoln National Life Insurance Company
PO Box 2212
1300 South Clinton Street
Fort Wayne, IN 46801-2212

- Transfers in-kind are not acceptable. (Securities should be liquidated, redeemed or sold.)
- You verified direct rollovers are allowed with your plan administrator and this amount is permitted to be rolled over.
- You relied on advice received from your tax advisor relating to federal and state income tax questions associated with this asset transfer and not upon any information furnished or representations made by Lincoln, its agents or employees.

If you want the asset transfer deposited differently than the investment elections already on file, you must complete the Lincoln Contract Information on the last page.

Participant's signature _____ Date ____/____/____

Plan administrator's signature _____ Date ____/____/____
(may be required by recipient vendor)

If you have any questions, please contact a customer service representative at 1-800-454-6265.

DO NOT complete this page if you want this asset transfer to be deposited the same as the investment option already on file.

7. Lincoln contract information

Complete this section for Multi-Fund® contracts only.

Investment funds selection must be in whole percentages and total 100%.

Preservation of Capital

- _____ % Fixed Account (FIXED ACCT)
- _____ % LVIP Government Money Market (LN GOV MM)

Income

- _____ % Delaware VIP® Diversified Income (DLW DVRSIN)
- _____ % Delaware VIP® High Yield (DLW HI YLD)
- _____ % LVIP BlackRock Inflation Protected Bond (BKRK INFPT)
- _____ % LVIP Delaware Bond (LN BOND)
- _____ % LVIP Delaware Diversified Floating Rate (LN DVRS FR)
- _____ % LVIP Global Income (GLOBAL INC)
- _____ % LVIP SSGA Bond Index (BOND IDX)
- _____ % PIMCO VIT Total Return (PIMCO VIT)

Growth & Income

- _____ % American Funds Growth-Income (AMF GR&IN)
- _____ % BlackRock Global Allocation V.I. (BK RK GL A)
- _____ % Delaware VIP® REIT (DLW REIT)
- _____ % Delaware VIP® Value (DLW VALUE)
- _____ % Fidelity® VIP Freedom 2020 PortfolioSM (FIDFRT2020)
- _____ % Fidelity® VIP Freedom 2025 PortfolioSM (FIDFRT2025)
- _____ % Fidelity® VIP Freedom 2030 PortfolioSM (FIDFRT2030)
- _____ % Fidelity® VIP Freedom 2035 PortfolioSM (FIDFRT2035)
- _____ % Fidelity® VIP Freedom 2040 PortfolioSM (FIDFRT2040)
- _____ % Fidelity® VIP Freedom 2045 PortfolioSM (FIDFRT2045)
- _____ % Fidelity® VIP Freedom 2050 PortfolioSM (FIDFRT2050)
- _____ % LVIP BlackRock Dividend Value Managed Volatility (BKRK DIV)
- _____ % LVIP BlackRock Scientific Allocation (BLRK SC AL)
- _____ % LVIP Delaware Wealth Builder Fund (DLW WEL BD)
- _____ % LVIP Global Conservative Allocation Managed Risk (LN GLB CON)
- _____ % LVIP Global Growth Allocation Managed Risk (LN GLB GR)
- _____ % LVIP Global Moderate Allocation Managed Risk (LN GLB MOD)
- _____ % LVIP JPMorgan Retirement Income (JPM RET IN)
- _____ % LVIP SSGA Global Tactical Allocation Managed Volatility (SS GLB TAC)
- _____ % LVIP T. Rowe Price 2010 Fund (TROWE 2010)
- _____ % LVIP T. Rowe Price 2020 Fund (TROWE 2020)
- _____ % LVIP T. Rowe Price 2030 Fund (TROWE 2030)
- _____ % LVIP T. Rowe Price 2040 Fund (TROWE 2040)
- _____ % LVIP T. Rowe Price 2050 Fund (TROWE 2050)

Long Term Growth

- _____ % American Funds Global Growth (AMF GL GR)
- _____ % American Funds Growth (AMF GROW)
- _____ % American Funds International (AMF INT'L)
- _____ % Delaware VIP® Small Cap Value (DLW SMCP V)
- _____ % Fidelity® VIP Contrafund® (FID CONTRA)
- _____ % Fidelity® VIP Growth (FID VIP GR)
- _____ % LVIP Blended Large Cap Growth Managed Volatility (LN LGCP GR)
- _____ % LVIP Clarion Global Real Estate (LN GL REIT)
- _____ % LVIP Delaware Social Awareness (LN SC AWRN)
- _____ % LVIP Delaware Special Opportunities (LN SPC OPP)
- _____ % LVIP Dimensional U.S. Core Equity 1 (DM CORE1)
- _____ % LVIP Franklin Templeton Global Equity Managed Volatility (FT GLB EQ)
- _____ % LVIP JPMorgan Select Mid Cap Value Managed Volatility (JPM MD VAL)
- _____ % LVIP Mondrian International Value (LN INT'L)
- _____ % LVIP SSGA International Index (INT'L IDX)
- _____ % LVIP SSGA S&P 500 Index (S&P 500 IN)
- _____ % LVIP Vanguard Domestic Equity ETF (LN VNG DE)
- _____ % LVIP Vanguard International Equity ETF (LN VNG INT)
- _____ % MFS® VIT Utilities (MFS UTILTS)

Maximum Capital Appreciation

- _____ % AB VPS Global Thematic Growth (AB VPS GL T)
- _____ % Delaware VIP® Smid Cap Core (DLW SMID)
- _____ % Deutsche Alternative Asset Allocation VIP (DEU ALT AL)
- _____ % LVIP Baron Growth Opportunities (BRN GR OPP)
- _____ % LVIP Blended Mid Cap Managed Volatility (LN MID CAP)
- _____ % LVIP SSGA Emerging Markets 100 (EMERG MKTS)
- _____ % LVIP SSGA International Managed Volatility (SSGA INTL)
- _____ % LVIP SSGA Small-Cap Index (SM CAP IN)
- _____ % LVIP T. Rowe Price Structured Mid-Cap Growth (TRP MIDCAP)

Participant's signature _____ Date _____/_____/_____

Entire form must be sent to:

Mail to: Servicing Office
 The Lincoln National Life Insurance Company
 PO Box 2340
 Fort Wayne, IN 46801-2340
 Telephone number: 800-454-6265
 Fax number: 260-455-1874

By Express Mail: The Lincoln National Life Insurance Company
 1300 South Clinton Street
 Fort Wayne, IN 46802-3506

Multi-Fund® variable annuity is issued on contract form numbers 18829, 18831, 25982, 28645, 30070-B and state variations and Lincoln Life Group Fixed Annuity on contract form numbers 19346, 26378 and state variations by The Lincoln National Life Insurance Company, Fort Wayne, IN, and distributed by Lincoln Financial Distributors, Inc., Radnor, PA, a broker-dealer. **Contractual obligations are subject to the claims-paying ability of The Lincoln National Life Insurance Company.**

Product and features subject to state availability. Limitations and exclusions may apply.

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.

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