



### City of Richmond 457(b) Plan

- Employees can choose to contribute with pre-tax money. Contribution limits for 2020 are \$19,500 or, if over age 50, \$26,000.
- The default investment is the target date option that is closest to the year you would turn age 65. Once enrolled, you may change your current or future investments at any time at [LincolnFinancial.com/retirement](http://LincolnFinancial.com/retirement).

Name \_\_\_\_\_

DOB \_\_\_\_\_ SSN \_\_\_\_\_

DOH \_\_\_\_\_ Email \_\_\_\_\_

Work Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Dept \_\_\_\_\_ Home Phone \_\_\_\_\_

Contribution \$ \_\_\_\_\_ (flat dollar amount) per paycheck

**Beneficiary Election:**

Primary  Secondary

Name \_\_\_\_\_

Relationship \_\_\_\_\_ Email \_\_\_\_\_

DOB \_\_\_\_\_ SSN (if known) \_\_\_\_\_ Percentage \_\_\_\_\_ %

Primary  Secondary

Name \_\_\_\_\_

Relationship \_\_\_\_\_ Email \_\_\_\_\_

DOB \_\_\_\_\_ SSN (if known) \_\_\_\_\_ Percentage \_\_\_\_\_ %

Primary  Secondary

Name \_\_\_\_\_

Relationship \_\_\_\_\_ Email \_\_\_\_\_

DOB \_\_\_\_\_ SSN (if known) \_\_\_\_\_ Percentage \_\_\_\_\_ %

Primary  Secondary

Name \_\_\_\_\_

Relationship \_\_\_\_\_ Email \_\_\_\_\_

DOB \_\_\_\_\_ SSN (if known) \_\_\_\_\_ Percentage \_\_\_\_\_ %

\_\_\_\_\_ I need help to rollover my previous employer plan or IRA!

By signing below, acknowledge that I have received enrollment materials and any prospectus links specific to my plan have been made available to me by my employer as part of my orientation.

Signature of Employee \_\_\_\_\_

Date \_\_\_\_\_



**Please contact your Lincoln Financial Advisors representative for personal assistance.**

**Maritza E. Rogers, CFP®, CRPC**  
Phone: (800) 359-8892 ext. 4106  
Fax: (650) 578-9640  
Email: [Maritza.Rogers@LFG.com](mailto:Maritza.Rogers@LFG.com)  
CA Insurance license #0E50369

**Julie VanTilburg, CFP®**  
Phone: (800) 377-4104  
Fax: (650) 581-3295  
Email: [Julie.VanTilburg@LFG.com](mailto:Julie.VanTilburg@LFG.com)  
CA Insurance license #0C21028

Lincoln Financial Advisors  
1510 Fashion Island Blvd, Suite 210  
San Mateo, CA 94404



This material must be preceded or accompanied by fund prospectuses for the investment options. **Please see reverse for additional important disclosures.**

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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**Mutual funds in the *Lincoln Alliance*<sup>®</sup> program are sold by prospectus. An investor should carefully consider the investment objectives, risks, and charges and expenses of the investment company before investing. The prospectus and, if available, the summary prospectus contain this and other important information and should be read carefully before investing or sending money. Investment values will fluctuate with changes in market conditions, so that upon withdrawal, your investment may be worth more or less than the amount originally invested. Prospectuses for any of the mutual funds in the *Lincoln Alliance*<sup>®</sup> program are available at 800-234-3500.**

The target date is the approximate date when investors plan to retire or start withdrawing their money. Some target date funds make no changes in asset allocations after the target date is reached; other target date funds continue to make asset allocation changes following the target date (see prospectus for the Fund's allocation strategy). The principal value is not guaranteed at any time, including at the target date.

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