

Instructions on how to enroll in a TD Ameritrade Self-Directed Brokerage Account

To enroll in the Self-Directed Brokerage Account (SDBA), follow the steps outlined below. (You can review the [SDBA for Plan Participants overview](#) for a better understanding of the SDBA option.) If you are considered an associated person, go to the documents specific to those roles (instructions on how to enroll in a TD Ameritrade Self-Directed Brokerage Account for associated persons).

Before considering the use of the Self-Directed Brokerage Account, we encourage you to review your objectives with a financial advisor. Lincoln does not monitor the funds available through the SDBA, and you assume all risk for the performance of these assets.

- 1 Read the [rules for establishing the SDBA](#).
- 2 Read the [Client Agreement](#).
- 3 Complete an [Account Agreement Form](#) for the plan in which you are a participant and for which you want to open an SDBA. On the form, under Account Information, include the Plan name and ID number (see below).
 - LNC Employees' 401(k) Savings Plan - ID #736LNE
 - LNL Agents' 401(k) Savings Plan - ID Number #736LNL
 - LNL Money Purchase Plan - ID Number #736LMP
 - LNL ABGA Money Purchase Plan - ID Number #736LBG
- 4 Review the associated costs for investing in the SDBA option: [Commissions and Service Fees](#)
- 5 Read [important information](#) concerning TD Ameritrade and your personal information.
- 6 Read [the TD Ameritrade Business Continuity Plan Statement](#).

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