

Town of Brattleboro Retirement Plans

Enrollment Form

PLEASE PRINT CLEARLY

You may use this form to select your initial investment options. To change your investment elections in the future, please visit www.LincolnFinancial.com or call *Lincoln Alliance*® Customer Service toll-free at 800 234-3500.

If you have previously elected investment options, Lincoln Financial Group cannot accept this form as a request to change your current elections.

Step 1: Tell us about yourself

Information provided on this form will be used exclusively for administering your account and sending financial documents and information related to your plan.

Name:

Last	First	M.I.
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Address

Street	City	State	Zip
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SSN#:

_____ - _____ - _____	Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Not married
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Phone:

(Daytime) _____ - _____ - _____	Date of birth: _____ / _____ / _____
	M M / D D / Y Y Y Y

Phone:

(Evening) _____ - _____ - _____	Date of hire: _____ / _____ / _____
	M M / D D / Y Y Y Y

Step 2: Name your beneficiary(ies)

To name more beneficiaries than this space permits, list them on a separate sheet, sign and date it, then attach it to this form and check this box: More beneficiaries attached I'm making changes to my existing beneficiary

Based on federal law, if you are married and you name a primary beneficiary other than your spouse, you must complete the Spousal Waiver Form provided with your enrollment materials.

Primary beneficiary	Name: _____ Share: _____ % <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%; text-align: center;">Last</td> <td style="width:30%; text-align: center;">First</td> <td style="width:20%; text-align: center;">M.I.</td> </tr> </table> Address _____ <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:33%; text-align: center;">Street</td> <td style="width:33%; text-align: center;">City</td> <td style="width:17%; text-align: center;">State</td> <td style="width:17%; text-align: center;">Zip</td> </tr> </table> SS#: _____ - _____ - _____ Date of birth: _____ / _____ / _____ Relationship: _____	Last	First	M.I.	Street	City	State	Zip
Last	First	M.I.						
Street	City	State	Zip					

Check one: <input type="checkbox"/> Primary beneficiary <input type="checkbox"/> Secondary beneficiary	Name: _____ Share: _____ % <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%; text-align: center;">Last</td> <td style="width:30%; text-align: center;">First</td> <td style="width:20%; text-align: center;">M.I.</td> </tr> </table> Address _____ <table border="1" style="width:100%; border-collapse: collapse;"> <tr> <td style="width:33%; text-align: center;">Street</td> <td style="width:33%; text-align: center;">City</td> <td style="width:17%; text-align: center;">State</td> <td style="width:17%; text-align: center;">Zip</td> </tr> </table> SS#: _____ - _____ - _____ Date of birth: _____ / _____ / _____ Relationship: _____	Last	First	M.I.	Street	City	State	Zip
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Last	First	M.I.						
Street	City	State	Zip					

(Please see reverse side)

Step 3: Choose your investment options

You must complete both Step 3A (401(a) Contributions) and Step 3B (457(b) Contributions) below. If you complete only one of these Steps but not both, your future contributions will be directed according to the elections you designated in the Step that you completed. If you do not complete either Step 3A or Step 3B, your future contributions will be directed to the qualified default investment alternative designated by your employer. You will then be able to move your assets out of that investment option.

Step 3A: Choose your investment options for your 401(a) Contributions

Determine your asset allocation percentages.

Fill in your own investment percentages. Your percentages must add up to 100% in increments of 1%.

Percentage	Investment Option	Percentage	Investment Option
	Cash and Stable Value Investments		Stock-based Investments, continued
%	Lincoln Stable Value Separate Account	%	American Funds Growth Fund of Amer R4
	Bond-based Investments	%	Artisan Mid Cap Value Investor
%	Franklin High Income R	%	Baron Growth Retail
%	PIMCO Total Return R	%	Columbia Acorn A
	Balanced Investments	%	Columbia Large Cap Index A
%	JHancock2 Lifestyle Conservative R4	%	Harbor International Inv
%	T. Rowe Price Retirement 2010 Adv	%	Invesco Mid Cap Core Equity A
%	T. Rowe Price Retirement 2020 Adv	%	Invesco Van Kampen SmallCapValue A
%	T. Rowe Price Retirement 2030 Adv	%	JHancock2 Lifestyle Aggressive R4
%	T. Rowe Price Retirement 2040 Adv	%	JHancock2 Lifestyle Growth R4
%	T. Rowe Price Retirement Income Adv	%	JPMorgan Small Cap Equity A
	Stock-based Investments	%	MFS Value A
%	American Funds EuroPacific Gr R4	%	T. Rowe Price Small-Cap Value Adv
<i>All investment percentages must equal 100%.</i>		100%	Total

Do you want your assets Automatically Rebalanced? If YES, select a frequency for each source shown below. (For a detailed explanation regarding this feature, please refer to "Before You Get Started.")

401(a) Account Balance Quarterly Semi-annually Annually **Start Date:** / /

Step 3B: Choose your investment options for your 457(b) Contributions

Determine your asset allocation percentages.

Fill in your own investment percentages. Your percentages must add up to 100% in increments of 1%.

Percentage	Investment Option	Percentage	Investment Option
	Cash and Stable Value Investments		Stock-based Investments, continued
%	Lincoln Stable Value Separate Account	%	American Funds Growth Fund of Amer R4
	Bond-based Investments	%	Artisan Mid Cap Value Investor
%	Franklin High Income R	%	Baron Growth Retail
%	PIMCO Total Return R	%	Columbia Acorn A
	Balanced Investments	%	Columbia Large Cap Index A
%	JHancock2 Lifestyle Conservative R4	%	Harbor International Inv
%	T. Rowe Price Retirement 2010 Adv	%	Invesco Mid Cap Core Equity A
%	T. Rowe Price Retirement 2020 Adv	%	Invesco Van Kampen SmallCapValue A
%	T. Rowe Price Retirement 2030 Adv	%	JHancock2 Lifestyle Aggressive R4
%	T. Rowe Price Retirement 2040 Adv	%	JHancock2 Lifestyle Growth R4
%	T. Rowe Price Retirement Income Adv	%	JPMorgan Small Cap Equity A
	Stock-based Investments	%	MFS Value A
%	American Funds EuroPacific Gr R4	%	T. Rowe Price Small-Cap Value Adv
<i>All investment percentages must equal 100%.</i>		100%	Total

Do you want your assets Automatically Rebalanced? If YES, select a frequency for each source shown below. (For a detailed explanation regarding this feature, please refer to "Before You Get Started.")

457(b) Account Balance Quarterly Semi-annually Annually **Start Date:** / /

Step 4: Sign your name

By signing below, I certify that:

- I have read, understand and agree to the terms on this form, the disclosures outlined in "Before You Get Started," and the distribution restrictions contained in the enrollment booklet.
- My investment choices are my own, and they were not recommended to me by Lincoln Financial Advisors or any other organization affiliated with the *Lincoln Alliance*[®] program.

Participant's signature X

Date:

RC name:

Return this form to: Town of Brattleboro, c/o Lincoln Retirement Services Co., PO Box 7876, Fort Wayne, IN 46801-7876

Mutual funds in the *Lincoln Alliance*[®] 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 contains 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*[®] program are available at 800 234-3500.

The program includes certain services provided by Lincoln Financial Advisors Corp. (LFA), a broker-dealer (member FINRA) and an affiliate of Lincoln Financial Group, 1300 S. Clinton St., Fort Wayne, IN 46802. Unaffiliated broker-dealers also may provide services to customers.

The Stable Value Account is a fixed annuity issued by The Lincoln National Life Insurance Company, Fort Wayne, IN, 46802 on Form 28866-SV and state variations thereof. Guarantees are based upon the claims-paying ability of the issuer.

Lincoln Retirement Services Company, LLC is an affiliate of Lincoln National Corporation.

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.

