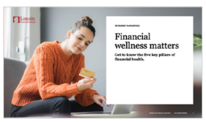
Participant seminars and videos

Use these educational seminars and videos in one-on-one or group settings to help engage and motivate your retirement plan participants. They focus on a variety of financial topics, including:

- Financial wellness and life events
- Take charge of change
- Social Security and Medicare
- Investment topics
- *Retirement Reality*® seminar series
- Online experience
- Additional retirement planning topics

Financial wellness and life events

The financial wellness program is designed to help participants achieve financial well-being and make thoughtful, smart decisions about their futures.



Financial wellness

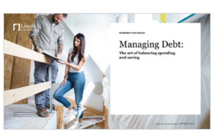
Covers a range of financial wellness topics to help participants save for retirement while managing competing financial priorities.

Seminar: DC-FW-PPT001
Seminar video: brainshark.com/1/player/lfg?pi=zGyzLbo9bzjZlz0&r3f1=&fb=0

Budgeting

Teaches participants how creating a budget can help them plan their financial roadmap, save for long-term goals, and minimize debt.

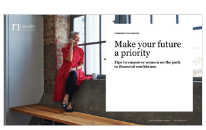
Seminar: DC-BUDG-PPT001
Seminar video: brainshark.com/1/player/en/lfg?pi=zGSz5XNsJzjZlz0&r3f1=&fb=0



Managing debt

Helps participants understand how to strike the proper balance between saving and spending.

Seminar: DC-DEBT-PPT001
Seminar video: brainshark.com/1/player/en/lfg?pi=zIKzXxfikzjZlz0&r3f1=&fb=0



Women and investing

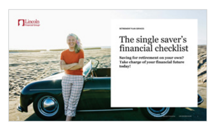
Discusses the issues that may affect women and offers solutions to help them own their financial futures.

Seminar: DC-WOINV-PPT001
Seminar video: brainshark.com/1/player/en/lfg?pi=zFazI7IQIzjZlz0&r3f1=&fb=0

Managing student loan debt

Discusses how to pay down student loan debt and save for other priorities.

Seminar: DC-RCSSL-PPT001
Video: marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/Video/6238667884001.html



Financial considerations for singles

Helps participants understand important financial decisions for singles.

Seminar: DC-SINGL-PPT004

Navigating family events

Considers the financial implications of marriage, divorce, and having a child.

Seminar: DC-LM-PPT001

Making a major purchase

Informs participants about budgeting and financing a new car or home.

Seminar: DC-CARH-PPT001

Countdown to college

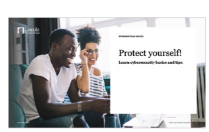
Helps participants plan ahead for the cost of college.

Seminar: DC-CPREP-PPT001

Raising financially savvy kids

Helps participants introduce key financial wellness topics to kids of various ages.

Seminar: DC-FWKID-PPT001



Cybersecurity

Teaches participants cybersecurity basics and tips to help safeguard their information.

Seminar: DC-CYBER-PPT001

Take charge of change

This program was designed to help participants navigate change and stay on track for the retirement they envision.

Take Charge of Uncertainty: Weathering the storm

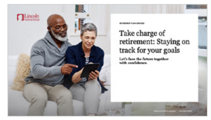
Helps participants navigate market fluctuations and keep a long-term perspective.

Seminar: DC-MKTVO-PPT001
Seminar video: brainshark.com/lfg/vu?pi=zHYzsWns0zjZlz0

Take Charge of Hardship: Staying on track for your goals

Educate savers about their options during times of financial hardship.

Seminar: DC-MKTVO-PPT002



Take Charge of Retirement: Staying on track for your goals

Help savers manage market volatility and review long-term financial strategies as they approach retirement age.

Seminar: DC-MKTVO-PPT003
Seminar video: brainshark.com/lfg/vu?pi=zHbzoluX6zjZlz0

Investment topics

This program covers investing basics that participants can incorporate into their overall financial strategy.

Asset allocation, diversification, and rebalancing

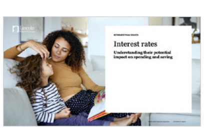
Addresses the importance of these three investment basics and explains how they all work together to help investors.

Seminar: DC-AA-PPT002
Seminar video: brainshark.com/lfg/vu?pi=zHazaYGjrzjZlz0

Market volatility

Help participants understand how to manage market volatility through diversification and keep their focus on long-term goals.

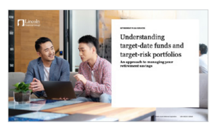
Seminar: DC-MV-PPT001
Seminar video: brainshark.com/lfg/vu?pi=zHSzXWoJmzjZlz0
Video: lfg.com/public/individual/manageyourretirementaccount/workplaceplan/investwisely/managemarketvolatility



Interest rates

Provides an overview of what causes interest rates to rise and fall and the impact on finances.

Seminar: DC-RATE-PPT001
Video: marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2017/Video/5516146197001.html



Understanding target-date funds and target-risk portfolios

Demonstrates how these funds and portfolios offer all-in-one, diversified solutions for managing retirement savings.

Seminar: DC-TDF-PPT004

Health savings accounts

Highlights the features and benefits of health savings accounts (HSAs)

Seminar: DC-HSA-PPT001
Seminar video: brainshark.com/1/player/lfg?pi=zGlz12aYU9zjZlz0&r3f1=&fb=0

Seminars from Morningstar

Use this collection of Morningstar seminars to help explain the basic principles of investing for retirement.

Investing for retirement seminar:
DC-IR-PPT001

Portfolio diversification and performance seminar:
DC-PDP-PPT001

Principles of investing seminar:
DC-PI-PPT001

Retirement income seminar:
DC-RI-PPT001

Social Security and Medicare

These materials are designed to help participants understand and make the most of Social Security and Medicare benefits.

Savvy Social Security planning

Helps baby boomer participants understand and make the most of their Social Security benefits.

English seminar: DC-SOC-PPT001

Spanish seminar: DC-SOC-PPT003

Managing healthcare expenses in retirement

Provides participants with an in-depth understanding of Medicare benefits.

English seminar: DC-MED-PPT001

Spanish seminar: DC-MED-PPT002

Demystifying Social Security

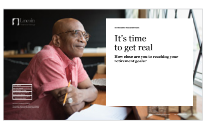
Provides participants a review of Social Security benefits and explains claiming strategies and how to estimate the amount they may expect to receive.

Seminar: DC-SS-PPT003

Video: marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/Video/6238670377001.html

Retirement Reality® seminar series

The *Retirement Reality*® seminar series is designed to help participants focus on actionable steps they can take to face retirement with confidence. Seminars are designed for target audiences and incorporate interactive worksheets. Review the program overview for more details: DC-RR-FLI484.

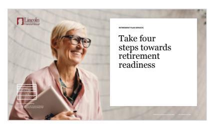


It's time to get real

Helps investors retiring in the next five years, who need to transition from saving to spending, set retirement goals, manage priorities, identify additional sources of retirement income, and maximize current savings.

Seminar: DC-REAL-PPT001

Seminar video: brainshark.com/lfg/vu?pi=zGJz4JnaBzjZlz0



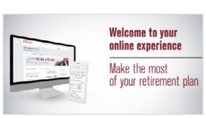
Take four steps towards retirement readiness

Teaches savers of all ages key investing behaviors: participate, save steadily, review allocations, and work with a financial professional.

Seminar: DC-4STEP-PPT002

Seminar video: brainshark.com/lfg/vu?pi=zGxz1969yezjZlz0

Online experience



Welcome to your online experience

These seminars and short videos show how the streamlined design and intuitive navigation of the participant online account website can help make retirement planning easy.

Seminar: DC-PEX-PPT001 **(*Lincoln Alliance*® program)**

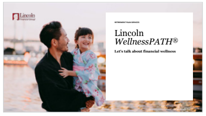
Seminar: DIR-PEX-PPT002 **(*Lincoln Director*℠)**

Video for *Lincoln Alliance*® program plans with Click2Contribute and online enrollment:
marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2016/Video/5050425546001.html

Video for *Lincoln Alliance*® program plans without Click2Contribute:
marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2016/Video/5125131221001.html

Video for *Lincoln Director*℠ plans with Click2Contribute and online enrollment:
marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2017/Video/5678115491001.html

Video for *Lincoln Director*℠ plans without Click2Contribute:
marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2016/Video/5173866735001.html



Lincoln *WellnessPATH*®

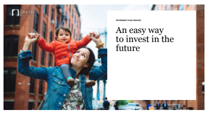
For plans that offer Lincoln *WellnessPATH*®, these materials demonstrate this easy-to-use online tool that can help participants manage their financial lives and achieve their short-term and long-term financial goals.

Seminar: DC-WELL-PPT001

Video for plans with Click2Meet:
marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2020/Video/5805820240001.html

Video for plans without Click2Meet:
marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2020/Video/5796285547001.html

Additional retirement planning topics



Enrollment seminar

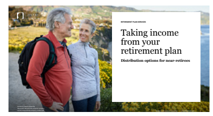
Highlights the advantages of plan participation and walks employees through the enrollment process. The seminar is a library of slides that can be tailored to each plan's features. Please contact your Lincoln representative for more information.

Seminar for *Lincoln Alliance*® program: LAP-ENRO-PPT001

Spanish Seminar for *Lincoln Alliance*® program: LAP-ENROS-PPT001

Seminar for *Lincoln Director*SM program: DIR-ENRO-PPT001

Spanish Seminar for *Lincoln Director*SM program: DIR-ENROS-PPT001

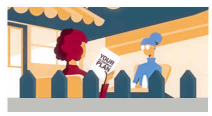


Distribution options overview

Helps participants better understand their distribution options when they're changing jobs or retiring.

Seminar: DC-DOS-PPT001

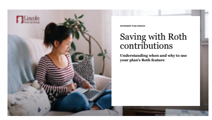
Seminar video: brainshark.com/1/player/lfg?pi=zGuzTZvKEzjZlz0&r3f1=&fb=0



Start saving today

Illustrates why it's important to start saving for retirement sooner rather than later.

Video: bcove.video/2AdV5rC

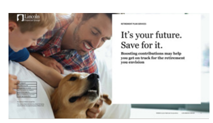


Pretax vs. Roth contributions

Compares these two contribution options to help employees choose the one most suitable for them.

Seminar: DC-ROTH-PPT001

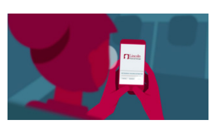
Seminar video: brainshark.com/1/player/lfg?pi=zGdzy7cLDzjZlz0&r3f1=&fb=0



Save More seminar

Shows participants how small savings boosts today can add up over the long term.

Seminar: DC-SAVE-PPT001



Estimate your retirement income

Shows in a short video how two different savers were able to use online tools to help work toward their retirement goals.

Video: bcove.video/30uLEOU

Contact your plan representative to order your materials.

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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Order code: DC-VID-BRC001

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