

## Change of deferral contribution status

### Important information

- Use this form to notify your employer of a change in your deferral rate, suspend your contributions or resume your contributions.
- Your employer will keep this form to update payroll.

### General information

Employer name \_\_\_\_\_

Plan name \_\_\_\_\_

Employee name (first, MI, last, suffix) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email address \_\_\_\_\_

Social Security number \_\_\_\_\_ Current phone number \_\_\_\_\_

Date of birth (mm, dd, year) \_\_\_\_\_ Date of hire (mm, dd, year) \_\_\_\_\_

### Suspend

I want to reduce my contributions to zero. Please execute this request as soon as administratively possible.

### Resume

Pretax salary deferral

I want to resume my participation in the plan and increase my employee salary deferral contributions from zero to \_\_\_\_\_% or \$\_\_\_\_\_. Please execute this request as soon as administratively possible.

Roth after-tax

I want to resume my participation in the plan and increase my Roth contributions from zero to \_\_\_\_\_% or \$\_\_\_\_\_. Please execute this request as soon as administratively possible.

### Change

Pretax salary deferral

I want to change my employee salary deferral contribution rate to \_\_\_\_\_% or \$\_\_\_\_\_. Please execute this request as soon as administratively possible.

Roth after-tax

I want to change my Roth contribution rate to \_\_\_\_\_% or \$\_\_\_\_\_. Please execute this request as soon as administratively possible.

### Signature

Employee signature \_\_\_\_\_ Date \_\_\_\_\_

Access your retirement plan information via:

- WebAccess, 24/7 – LincolnFinancial.com
- Automated telephone access service, 24/7 – 800-510-4015
- Customer service center – 800-510-4015, from 8 a.m. to 8 p.m., Eastern

You may use any of the above services to change the allocation of your future contributions or your existing account balance.

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