

Participant Seminars and Videos

An overview of educational seminars and videos to help engage and motivate your retirement plan participants

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RETIREMENT PLAN SERVICES

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Everyday Matters seminars and videos

The Everyday Matters Financial Insights Series facilitates conversations with participants in one-on-one or small group meetings. Seminars and videos focus on a variety of financial topics.



Financial Wellness

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

Seminar: DC-FW-PPT001



Retire Right

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 with presenter:

<http://www.brainshark.com/lfg/vu?pi=zHyzmVjrVzjZlZ0>



Managing Debt

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

Seminar: DC-DEBT-PPT001

Seminar with presenter:

<http://www.brainshark.com/lfg/vu?pi=zHRz18PRxQzjZlZ0>

Video (Lincoln representative version): <http://bcove.video/2oRyJET>

Video (Financial professional version): <http://bcove.video/2pUEG4i>



Managing Student Loan Debt

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

Seminar: DC-RCSSL-PPT001



Everyday Matters seminars and videos



Love and Money

Considers the financial implications of marriage, divorce and blended families

Seminar: DC-LM-PPT001



Ready to Buy a Car or a Home?

Informs participants about budgeting and financing a new car or home

Seminar: DC-CARH-PPT001



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



Interest Rates

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

Seminar: : DC-RATE-PPT001

Video (Login version):

<http://marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2017/Video/5516146197001.html>

Video (Financial professional version):

<http://marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2017/Video/5516153503001.html>



Market Bubbles

Teaches participants about previous market bubbles and ways to navigate market bubbles in the future

Seminar: DC-BUBB-PPT001

Video (Login version):

<http://marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2017/Video/5543950782001.html>

Video (Financial professional version):

<http://marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2017/Video/5543114013001.html>



Everyday Matters seminars and videos



Financial Considerations for Singles

Helps single participants understand some important financial decisions for them

Seminar: DC-SINGL-PPT004



Health Savings Accounts

Highlights the features and benefits of Health Savings Accounts (HSAs)

Seminar: DC-HSA-PPT001

Seminar with presenter:
<http://www.brainshark.com/lfg/vu?pi=zGxzLHokIzjZlZ0>



Demystifying Social Security

Provides participants an in-depth 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 (Login version):

<http://marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2017/Video/5493260346001.html>

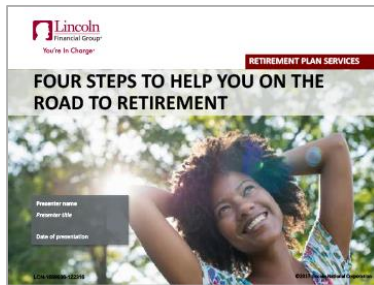
Video (Financial professional version):

<http://marketingmedia.lfg.com/lfg/DOCS/lfd/emailMarketing/2017/Video/5483946123001.html>



Retirement Reality[®] seminar series

This robust series of seminars is designed to take retirement planning to the next level. Seminars are designed for target audiences and incorporate interactive worksheets and calculators. See Overview for more details: DC-RR-FLI484.



Realize Your Retirement Savings Dreams in Four Simple Steps

Audience: Savers of all ages
Seminar goals: Learn key investing behaviors: participate, save steadily, review allocations and work with a financial professional

Seminar: DC-4STEP-PPT002



Get Real

Audience: Investors retiring in the next five years who need to transition from saving to spending
Seminar goals: Set retirement goals, manage priorities, identify additional sources of retirement income and maximize current savings

Seminar: DC-REAL-PPT001



Envision Your Financial Future

Audience: Investors at the midpoints of their careers
Seminar goals: Establish retirement income goals and continually boost savings

Seminar: DC-EYFF-PPT002



Take Charge of Your Retirement

Audience: Investors within 12 to 16 months of retirement
Seminar goals: Help participants understand how to manage retirement plan assets, benefits, and Social Security and Medicare.

Seminar: DC-DOIT-PPT001



Retirement Reality[®] seminar series



Al Mando (Spanish seminar)

Audience: Spanish-speaking retirement savers of all ages and their families

Seminar goals:

- Remind Latinos who may be anxious about financing their retirement that they may achieve this goal with thoughtful planning and commitment
- Help each of them set retirement goals and priorities and create a budget
- Motivate them to be better prepared for retirement using culturally relevant messaging that aligns with their needs and values

Seminar: DC-RRSP-PPT002



Additional seminars and videos



Enrollment seminar

This seminar highlights the advantages of plan participation and walks employees through the enrollment process. The seminar is comprised of a library of slides that can be tailored to each plan's design.

Lincoln Alliance[®]: DC-ENROL-PPT006
*Lincoln Director*SM: DC-ENROL-PPT008



Save More seminar

This seminar shows participants how small savings boosts today can add up over the long term. It includes a short video that features a variety of investors sharing savings tips and stories.

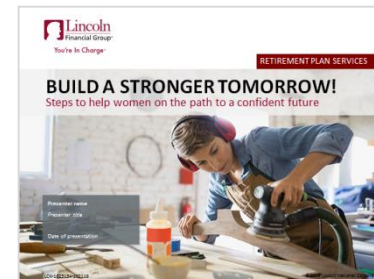
Seminar: DC-SAVE-PPT001



Asset allocation, diversification and rebalancing

This seminar addresses the importance of these three investment basics and explains how they all work together to help investors manage investment risk, maximize growth potential, and maintain an investment mix consistent with their goals and risk tolerance.

Seminar: DC-AA-PPT002



Women and investing

This seminar and video highlight the issues that may affect women and offers solutions to help them own their financial futures. The seminar and video encourage discussion and use a modular approach to ensure that presenters cover topics of interest to attendees.

Seminar: DC-WOINV-PPT001

Video with presenter:

<http://www.brainshark.com/lfg/vu?pi=zH2zmMoPBzjZlZ0>



Online account website seminar and videos



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*SM)

Lincoln Alliance[®] program Click2Contribute and online enrollment:

<http://marketingmedia.fg.com/lfg/DOCS/lfd/emailMarketing/2016/Video/5050425546001.html>

Lincoln Alliance[®] program non-Click2Contribute:

<http://marketingmedia.fg.com/lfg/DOCS/lfd/emailMarketing/2016/Video/5125131221001.html>

*Lincoln Director*SM Click2Contribute and online enrollment:

<http://marketingmedia.fg.com/lfg/DOCS/lfd/emailMarketing/2017/Video/5678115491001.html>

*Lincoln Director*SM non-Click2Contribute:

<http://marketingmedia.fg.com/lfg/DOCS/lfd/emailMarketing/2016/Video/5173866735001.html>



Additional videos



Works for Me

Looks at the benefits of participating in an employer-sponsored retirement plan through the eyes of participants

<http://bcove.video/2ohmccH>



Your Future: Worth Saving For

Features fun, on-the-street interviews that show what others are doing — or not doing — to save for retirement

<http://bcove.video/2oRoikv>



Start Saving Sooner

Shows how beginning to save now and saving consistently over time can make a big difference at retirement

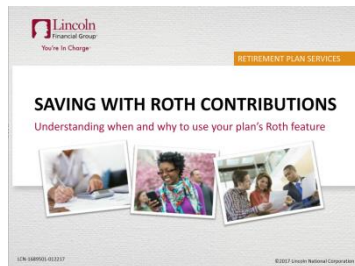
<http://bcove.video/2nTP4Vr>



Thank Yourself Tomorrow

Highlights three actions participants can take to help them save more for the future

<http://bcove.video/2pEGuh3>



Traditional vs. Roth

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

www.brainshark.com/lfg/vu?pi=zGjz1qwFJzjZlz0



Distribution options overview

Helps give participants a better understanding of their distribution options when they're changing jobs or retiring

Retiree: <http://bcove.video/2ohmekV>
Job Leaver: <http://bcove.video/2nTyGEf>



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