

Lincoln PlanSource Advantage (PSA) Program

For purposes of the Lincoln PSA Program:

Lincoln means “Lincoln Financial”

“Eligible Employer Groups” means those employer groups to whom PlanSource provides certain services under a written agreement, and who may elect to purchase certain Eligible Product Lines under the PSA Program.

“Eligible Product Lines” means those Lincoln products that PlanSource will offer to Eligible Employer Groups under the PSA Program.

Under the PSA Program, Eligible Employer Groups may earn monetary credits for offering Eligible Product Lines to its employees. Credits to each Eligible Employer Group are based on each Eligible Product Line multiplied by the number of employees enrolled in each product. PlanSource will apply any credits earned under the Lincoln program to an Employer Group’s account in the month the plans are effective with PlanSource, once the Eligible Employer Group’s information is uploaded into the PlanSource system and PlanSource and Lincoln have verified all enrollment information.

The Eligible Product Lines and respective credit amounts for the Lincoln program are listed below in Table 1, with additional notes below:

- Applies to new lines of business only
- Credits apply the month the plans are effective
- Lincoln underwriting required on all groups

Table 1. Eligible Product Lines for Carrier

Eligible Product Line	Valid Geographic Markets	Valid Employer Sizes	Product Line Credit
Accident	All	100+ Employees	\$0.25
AD&D	All	100+ Employees	\$0.20
Basic Life	All	100+ Employees	\$0.20
Critical Illness	All	100+ Employees	\$0.30
Dental	All	100+ Employees	\$0.80
Long Term Disability	All	100+ Employees	\$1.00
Short Term Disability	All	100+ Employees	\$0.90
Vision	All	100+ Employees	\$0.15
Voluntary AD&D	All	100+ Employees	\$0.70
Voluntary Life	All	100+ Employees	\$0.70
Voluntary LTD	All	100+ Employees	\$1.00
Voluntary STD	All	100+ Employees	\$0.90