

# Get started with your retirement plan

Enrolling in the **City of Boise 457(b) retirement plan** can help you prepare for a successful future. Use this checklist to make the most out of your retirement plan benefit.



**RACHAEL SCHNEIDER**  
360-580-9741  
Rachael.Schneider@LFG.com



**AIKO LUKING**  
971-484-2663  
Aiko.Luking@LFG.com

## Retirement plan checklist

- Register your online account at [LincolnFinancial.com/Retirement](https://LincolnFinancial.com/Retirement).** In addition to making it easier to manage planning for your retirement, registering helps protect you from potential cybercrime.
- IMPORTANT: Name your beneficiary.** Designating a beneficiary ensures that your hard-earned savings go where you wish.
- Meet the match.** The City of Boise 457(b) retirement plan may offer an employer match. Please check with human resources or one of your Lincoln retirement consultants to learn more.
- Consider automatic increases.** It's not always easy to save as much as you'd like right away. You can set up automatic increases at a percentage and time frame that are right for you.
- Choose investments.** If you enroll but don't choose investments, your money is invested in the default investment option for your age. Research fees and performance in your online account or talk to your Lincoln retirement representative.
- Consider rolling money from old retirement plans into your current account.** Your Lincoln retirement consultant can explain your options so you can make the decision that's right for you.



### Personal help is available

Your dedicated Lincoln retirement consultants, **Rachael Schneider** and **Aiko Luking**, can help you make the most of your benefits so you'll be ready to enjoy the retirement you envision.

Schedule a meeting by scanning the QR code or visiting [LincolnFinancial.com/BoiseSchedule](https://LincolnFinancial.com/BoiseSchedule).





Your tomorrow.  
Our priority.™

©2025 Lincoln National Corporation

[LincolnFinancial.com/Retirement](https://LincolnFinancial.com/Retirement)

Lincoln Financial is the marketing name for Lincoln National Corporation and its affiliates.

Affiliates are separately responsible for their own financial and contractual obligations.

PAD-8347893-090225

PDF 9/25 **Z04**

**Order code: COB-NEWHR-FLI001**

This material is provided by The Lincoln National Life Insurance Company, Fort Wayne, IN, and, in New York, Lincoln Life & Annuity Company of New York, Syracuse, NY, and their applicable affiliates (collectively referred to as "Lincoln"). **The Lincoln National Life Insurance Company does not solicit business in the state of New York, nor is it authorized to do so.** This material is intended for general use with the public. Lincoln does not provide investment advice, and this material is not intended to provide investment advice. Lincoln has financial interests that are served by the sale of Lincoln programs, products, and services.

The mutual fund-based programs include services provided by Lincoln Retirement Services Company, LLC and Lincoln Financial Group Trust Company, Inc. with wholesale marketing and distribution services provided by Lincoln Financial Distributors, Inc. (LFD), a wholesale broker-dealer (member FINRA). All entities listed are affiliates of Lincoln Financial, the marketing name for Lincoln National Corporation. Unaffiliated broker-dealers also may provide services to customers. Account values are subject to fluctuation, including loss of principal.

Lincoln retirement consultants are registered representatives of LFD. Retirement consultants do not provide tax or legal advice. Retirement consultants do not provide investment advice or recommendations.