



ADDITIONAL INVESTMENT INSTRUCTIONS FORM Lincoln Income and Growth

Please Print or Type

This form should be used for investments made subsequent to the initial IRA opening. Each alternative investment has specific rules around additional investments, please review the terms and conditions outlined within the specific product prospectus for details.

Forward To: First Trust Retirement, c/o DST Systems, Inc.

Regular Mail PO Box 219731 Kansas City, MO 64121-9731 855-387-3847

Overnight Delivery Mail Stop: Lincoln 430 West 7th Street Kansas City, MO 64105-1407

Step 1: NAME & ADDRESS

IRA Owner Name Social Security Number Account Number Address City / State / Zip Phone Number

Step 2: IRA CONTRIBUTION INFORMATION

Select the IRA contribution type.

Traditional IRA OR Roth IRA checkboxes for Regular/Annual Contribution, Transfer, Rollover, Recharacterization, SEP IRA, etc.

*An IRA Application is required if the plan type does not already exist within the product sponsor.

Step 3: INVESTMENT INSTRUCTIONS

I direct First Trust Retirement, Custodian, to invest any cash contributions as follows:

Table with checkboxes for Lincoln Retail Income & Growth, Undirected Cash*, Annual Custodian Admin Fee**, and Total.

*Any uninvested or undirected cash in your IRA will be deposited in an interest bearing Morrill & Janes Bank and Trust Company NOW Account (Undirected Cash).

**\$35 Annually. The Annual Custodian Admin Fee may be paid by you directly; or the Custodian may deduct them from your IRA or from your monthly distributions.

Step 4: IRA OWNER AFFIRMATION

I direct First Trust Retirement (the "Custodian"), trade name of Mainstar Trust, to execute, as Custodian, the purchase of the above-named asset for the benefit of my self-directed IRA account.

- I have had the opportunity to review this transaction with tax, legal, financial and/or other advisors... I understand that if the assets are not publicly traded... I agree to indemnify and hold First Trust Retirement harmless...

Step 5: SIGNATURE REQUIRED

I hereby acknowledge that this agreement is between the IRA Owner named in Step 1 and the Custodian and that Product and its affiliates (i) shall have no obligations or liability under this agreement...

IRA Owner Signature Date