Worksite Financial Solutions Mobile App

Advisor Overview and FAQ

The Worksite Financial Solutions mobile app will serve as an extension of LPL's Worksite Financial Solutions platform, providing plan participants with access to manage their retirement plan accounts directly from their mobile devices anywhere, any time.

Retirement plan participants will now be able to manage financial decisions with greater flexibility and ease than ever before. This new app will provide plan participants with:

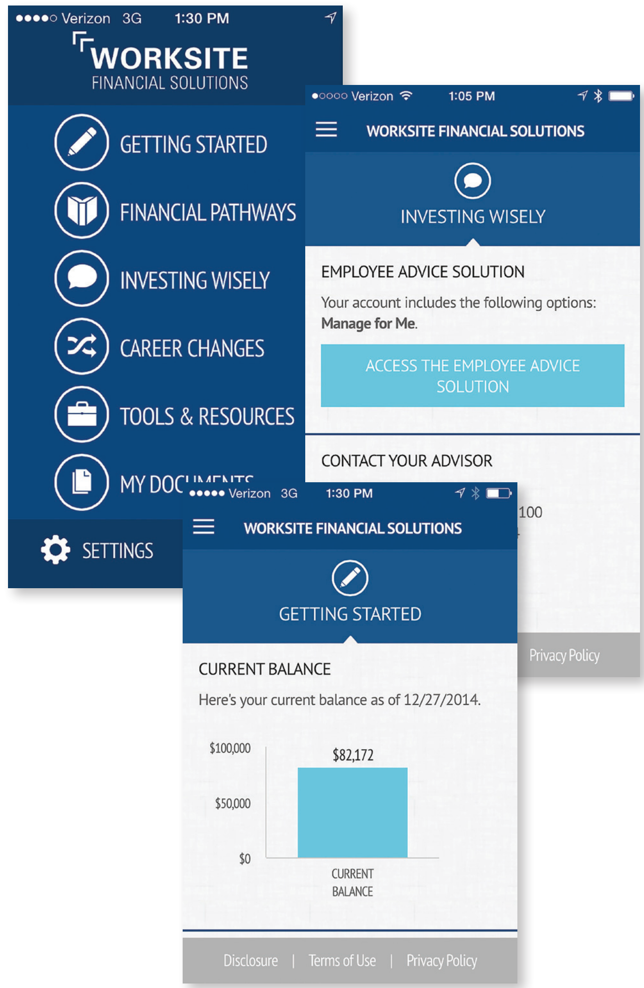
- End-to-end plan support to guide them through every phase of their retirement planning process
- Enrollment and access to the Employee Advice Solution
- Access to qualified LPL advisors and the Retirement Results Team and on-going support on how to best manage their retirement plan accounts
- Robust financial education tools, including calculators, tutorials, videos and articles on how to best manage each phase of their financial life cycle

The app is available for download in both the Apple App Store and Google Play Store:

Apple App Store:

Google Play Store:

Scan here to download the app.



The app also provides the ability to feature your name and contact information and is yet another way for you and your plan sponsors to offer plan participants the support they need. It will help enhance your participant relationship by providing additional opportunities for communication and interaction on a regular basis.

Contact a Retirement Plan Consultant today at (866) 383-4015, option 1 for further information.

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FAQ

What Worksite platforms does the app support?

The Employee Advice Solution*

- Participant enrollment access in the Employee Advice Solution
- Participant access and the ability to change selections

The Employee Education Solution

- Access to the Financial Learning Center and the participant financial wellness assessment, along with robust tools and resources for retirement planning including videos, tutorials, articles and calculators

The Employee Transition Solution

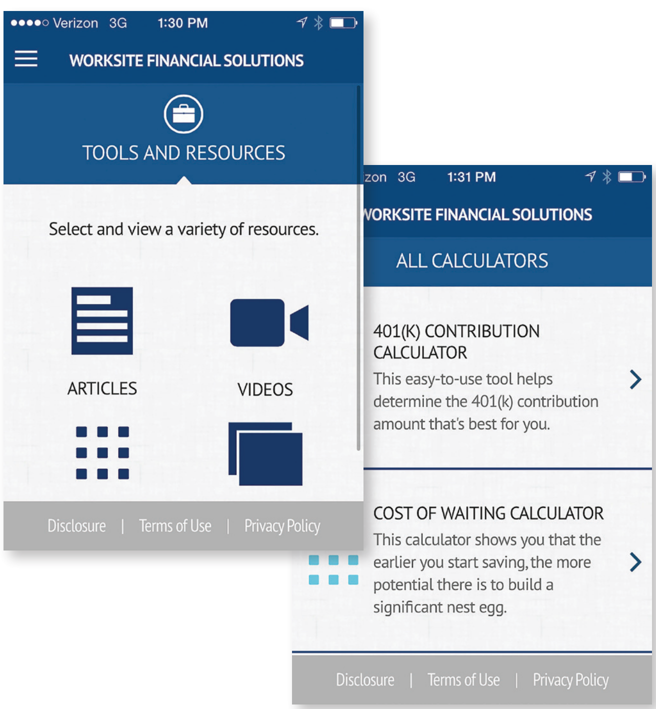
- Access to distribution options for participants in career transition

The Employee Engagement Solution

- Participant login access to recordkeeper(s) site
- Support for rolling into existing employer's plan

Access to all Tools and Resources on worksitefinancialsolutions.com to help participants with retirement readiness

- Calculators
- Videos
- Tutorials
- Articles on a variety of retirement topics



How do participants get access to the app?

This free app is available for download through the Apple App Store for iPhone iOS and through Google Play Store for the Android platform.

What is required to set up an account?

It takes about 10 minutes for a participant to create an account and link to a retirement plan. Six security questions will be asked, along with email validation and personally identifiable information to confirm enrollment in a retirement plan: Last Name, Social Security Number and Date of Birth.

How do I get my logo and contact information loaded into the app?

Your information is loaded into the app automatically upon your consent. The information that you provide to the Retirement Results team when your plan is onboarded is reflected in the mobile app.

Do all my plans have access to the app?

Any plan that is enrolled in one or more of the Worksite offerings is supported on the mobile app.

How secure is participant data?

LPL is committed to maintaining the security of participant data. We ask six security questions when they create an account, utilize three key data points to verify identity in their retirement plan, require email validation, new device registration and also use a layer of security called adaptive authentication.

Who do they call with questions?

The Retirement Results Team at (855) 575-4015.

How often is the plan participant data updated?

Daily or as often as recordkeeper(s) refresh plan information.

Is there a separate version for advisors?

No, as with the Worksite platform, the app is participant facing.

Will participants have to update the app?

Yes, as new releases and enhancements are available, updates will be provided in both the Apple App Store and in the Google Play Store.

* Additional information about the Employee Advice Solution and the participant's retirement plan may be found on the web site at

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