



The Lincoln National Life Insurance Company
 P.O. Box 2616, Omaha, NE 68103-2616
 Phone: 800-423-2765 Fax: 877-573-6177

Here is your Enrollment Form.

Group ID: BERKELEYS

Follow these steps to complete the form.

Print clearly in ink.

Step 1: Fill in or confirm your personal information.

Step 2: Fill in dependent information, if any.

Step 3: Select your benefits.

Step 4: Assign beneficiaries.

Step 5: Confirm enrollment.

Step 6: Sign, date & return the form.

1. Your Personal Information

Group/Employer/Participating Organization Name		County	Zip	State
<u>Berkeley Unified School District</u>		<u>Alameda</u>	<u>94702</u>	<u>CA</u>
Your First Name	Middle Name/MI	Last Name	Social Security No.	Employee ID No. Date of Birth
_____	_____	_____	____-____-____	____/____/____
Street Address (Include Apt. or Suite No.)		City	State	Zip
_____		_____	_____	_____
Home Phone	Cell Phone	Work Phone	Email Address	
() - _____	() - _____	() - _____	_____	
Gender: <input type="checkbox"/> Male <input type="checkbox"/> Female		Marital Status: <input type="checkbox"/> Married <input type="checkbox"/> Single		

2. Personal Information on Dependents — Complete if you are enrolling dependents.

<input type="checkbox"/> Spouse		<input type="checkbox"/> Domestic Partner				
First Name	Middle Name/MI	Last Name	Social Security No.	Date of Birth		
_____	_____	_____	____-____-____	____/____/____		
Provide contact information if different than Your information above.						
Home Phone	Cell Phone	Work Phone	Email Address			
() - _____	() - _____	() - _____	_____			
Dependent Children – List all children you are enrolling (attach a separate sheet, if needed).						
First Name	Middle Name/MI	Last Name	SSN (Optional)	Gender	DOB	Full-time Student
_____	_____	_____	____-____-____	<input type="checkbox"/> Male <input type="checkbox"/> Female	____/____/____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	_____	____-____-____	<input type="checkbox"/> Male <input type="checkbox"/> Female	____/____/____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	_____	____-____-____	<input type="checkbox"/> Male <input type="checkbox"/> Female	____/____/____	<input type="checkbox"/> Yes <input type="checkbox"/> No

Employer Completes this Section.

Billing Division or Location: _____

Sort Group/Code: _____ Payroll Cycle: _____

Policy #(s): 000400001000-23021

Average Hours Worked Per Week: _____ Full-time Part-time Occupation: _____

Earnings: Hourly Weekly Monthly Yearly \$ _____ Date of Employment: ____/____/____

Actively at Work? Yes No Date of Rehire: ____/____/____

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

3. Benefit Selection — Choose your benefits.

Mark the box or boxes for each type of group insurance you are applying for. All insurance amounts are subject to the limitations and exclusions stated in the policy and certificate. (Spouse includes your Domestic Partner.)

Voluntary Group Insurance				
Employer Completes this section.		Type of Insurance	Amount of Insurance	Total Premium
Class	Effective Date			
_____	____/____/____	Voluntary Life Only <input type="checkbox"/> Yes <input type="checkbox"/> No*	<input type="checkbox"/> \$10,000 <input type="checkbox"/> \$20,000 <input type="checkbox"/> \$60,000 <input type="checkbox"/> \$100,000 <input type="checkbox"/> \$200,000 <input type="checkbox"/> Other \$	\$ _____
_____	____/____/____	Voluntary Dependent (Spouse Only) Life Only <input type="checkbox"/> Yes <input type="checkbox"/> No* <i>You must be enrolled for Life insurance in order to add spouse and/or child insurance.</i>	<input type="checkbox"/> \$5,000 <input type="checkbox"/> \$10,000 <input type="checkbox"/> \$30,000 <input type="checkbox"/> Other \$	\$ _____
_____	____/____/____	Voluntary Dependent (Child Only) Life Only <input type="checkbox"/> Yes <input type="checkbox"/> No* <i>You must be enrolled for Life insurance in order to add spouse and/or child insurance.</i>	<input type="checkbox"/> \$2,500 <input type="checkbox"/> \$5,000 <input type="checkbox"/> \$7,500 <input type="checkbox"/> \$10,000	\$ _____

*By selecting "No," application for insurance at a later date may require further medical information and/or a physical exam, which will be at my own expense.

--Actual deductions may vary slightly from above illustrations due to rounding--

4. Select Your Beneficiaries — Choose who receives your insurance benefits.

Primary Beneficiary(ies)
The Primary Beneficiary is the person(s) you identify to receive insurance benefits upon your death.

**If more than three Primary Beneficiaries, please attach a separate sheet of paper.
 If multiple Primary Beneficiaries, total percentage of all combined must equal 100%.**

First Name	Middle Initial	Last Name	
Street Address		City	State Zip
Social Security Number ____-____-____	Date of Birth ____/____/____	Relationship to You _____	Percentage _____ % Phone Number () - _____

First Name	Middle Initial	Last Name	
Street Address		City	State Zip
Social Security Number ____-____-____	Date of Birth ____/____/____	Relationship to You _____	Percentage _____ % Phone Number () - _____

First Name	Middle Initial	Last Name	
Street Address		City	State Zip
Social Security Number ____-____-____	Date of Birth ____/____/____	Relationship to You _____	Percentage _____ % Phone Number () - _____

Contingent Beneficiary(ies) and Other Beneficiary Designations

A Contingent Beneficiary will receive benefits only if the Primary Beneficiary(ies) does not survive you. Please attach a separate sheet to identify a Contingent Beneficiary. If multiple Contingent Beneficiaries, total percentage of all combined must equal 100%. To name a Beneficiary(ies) by product, attach a separate sheet identifying product and beneficiary.

5. Confirm Enrollment

This group insurance has been offered to me and after careful consideration of the benefits, I have decided to:

- ENROLL FOR INSURANCE for which I am or may become eligible** under the group policies issued by The Lincoln National Life Insurance Company, or its insurance partners. If contributions are required, I authorize my Employer to deduct premium from my pay.
- NOT ENROLL myself in the group insurance offered.** I understand if I enroll for insurance at a later date, and if a physical examination or further medical information is required, it will be at my own expense.
- NOT ENROLL my dependents in the group insurance offered.** I understand if I enroll my dependents for insurance at a later date, and if a physical examination or further medical information is required, it will be at my own expense.

Fraud Warning/State Disclosure(s)

A PERSON MAY BE COMMITTING INSURANCE FRAUD IF HE OR SHE SUBMITS AN APPLICATION CONTAINING A FALSE OR DECEPTIVE STATEMENT WITH THE INTENT TO DEFRAUD (OR KNOWING THAT HE OR SHE IS HELPING TO DEFRAUD) AN INSURANCE COMPANY. THE FALSITY OF ANY STATEMENT IN THIS APPLICATION SHALL NOT BAR THE RIGHT TO RECOVERY UNDER THE POLICY UNLESS SUCH FALSE STATEMENT WAS MADE WITH ACTUAL INTENT TO DECEIVE OR UNLESS IT MATERIALLY AFFECTED EITHER THE ACCEPTANCE OF THE RISK OR THE HAZARD ASSUMED BY THE INSURER.

CALIFORNIA LAW PROHIBITS AN HIV TEST FROM BEING REQUIRED OR USED BY HEALTH INSURANCE COMPANIES AS A CONDITION OF OBTAINING HEALTH INSURANCE COVERAGE.

6. Sign and Return

I understand the group insurance requested will not be effective until approved by the Group Insurance Service Office of The Lincoln National Life Insurance Company, or its insurance partners. A delayed effective date will apply if you are not Actively at Work/an Active Member. A delayed effective date may apply to your dependent, if he or she is confined in a hospital or health care facility or is in a period of limited activity on the date insurance would otherwise take effect.

I understand the information provided is for enrollment in group insurance as offered by my Employer and will not be used for underwriting purposes.

The information provided is complete, true, and accurate to the best of my knowledge.

Your Full Name (Print): _____

Your Signature: **X** _____ Date ____/____/____

Complete and return this form.

(Be sure to sign and date the form to start your insurance.)

Questions? Call 800-423-2765