

Lincoln Financial announces the launch of Stadion Money Management's StoryLine Dynamic, a Qualified Default Investment Alternative solution

Dynamic QDIA solution is designed to evolve with plan participants along their retirement journey

RADNOR, Pa. - August 15, 2022 - [Lincoln Financial Group](#) (NYSE:LNC) today announced the launch of Stadion's StoryLine Dynamic, a Qualified Default Investment Alternative (QDIA) program, built in collaboration with [Stadion Money Management](#).

The QDIA program is designed to evolve with plan participants and transition their investments to a more custom, personalized allocation strategy as they near retirement age. Built with Stadion's technology, this solution combines a target date fund (TDF) for younger individuals with Stadion's StoryLine managed account service for participants aged 50 and older.

"Throughout a participant's retirement journey their needs change, and StoryLine Dynamic is designed to evolve to meet their needs," said Ralph Ferraro, senior vice president, president of Retirement Plan Services, Lincoln Financial Group. "This new offering will allow plan sponsors to offer a more robust, customized retirement solution for participants who are not as actively engaged in making investment decisions to help them achieve better retirement outcomes."

Through this solution, plan participants can benefit from professional asset allocation that can adapt to their specific needs as they near retirement – something many participants wish they understood better. According to research from Lincoln Financial, more than a third of plan participants report not understanding what investments to choose or how to manage investments as they age¹.

"Expanding our solution with Lincoln Financial demonstrates our joint commitment to offering services that help people prepare for retirement," said Todd Lacey, Chief Revenue Officer for Stadion Money Management and Smart. "Stadion's technology provides a way for Lincoln Financial to facilitate a dynamic QDIA program."

[Stadion Money Management](#) (recently acquired by Smart, a global savings and investments technology provider) is a managed account provider offering personalized retirement services to plan sponsors and their participants.

For more information, [click here](#).

Investment advisory and portfolio management services offered through StoryLine are provided exclusively by Stadion Money Management which is neither an affiliate nor a member of the Lincoln Financial Group. Lincoln Financial solely provides recordkeeping and administrative services with respect to the retirement plans and their participants and does not provide investment advice or recommendations.

¹2021 Lincoln Retirement Power® Study

About Lincoln Financial Group

Lincoln Financial Group provides advice and solutions that help people take charge of their financial lives with confidence and optimism. Today, approximately 16 million customers trust our retirement, insurance and wealth protection expertise to help address their lifestyle, savings and income goals, and guard against long-term care expenses. Headquartered in Radnor, Pennsylvania, Lincoln Financial Group is the marketing name for Lincoln National Corporation (NYSE:LNC) and its affiliates. The company had \$279 billion in end-of-period account values as of June 30, 2022. Lincoln Financial Group is a committed corporate citizen included on major sustainability indices including the Dow Jones Sustainability Index North America and FTSE4Good and ranks among Newsweek's Most Responsible Companies. Dedicated to diversity, equity and inclusion, we are included on transparency benchmarking tools such as the Corporate Equality Index, the Disability Equality Index and the Bloomberg Gender-Equality Index. Committed to providing our employees with flexible work arrangements, we were named to FlexJobs' list of the Top 100 Companies to Watch for Remote Jobs in 2022. With a long and rich legacy of acting ethically, telling the truth and speaking up for what is right, Lincoln was recognized as one of Ethisphere's [2022 World's Most Ethical Companies®](#). Learn more at: www.LincolnFinancial.com. Follow us on [Facebook](#), [Twitter](#), [LinkedIn](#), and [Instagram](#). Sign up for email alerts at <http://newsroom.lfg.com>.

About Stadion Money Management

Established in 1993, Stadion is headquartered near Athens, Georgia. Stadion works with financial professionals, asset managers, and recordkeepers to build custom retirement plans and participant level investment solutions. Stadion Money Management, LLC ("Stadion") is a registered investment adviser under the Investment Advisers Act of 1940. Registration does not imply a certain level of skill or training. More information about Stadion, including fees, can be found in Stadion's ADV Part 2, which is available upon request.

Visit Stadion Money Management at www.stadionmoney.com.

About Smart

Smart is a global savings and investments technology provider. Its mission is to transform retirement, savings, and financial well-being, across all generations, around the world.

Legal & General, J.P. Morgan, Fidelity International Strategic Ventures, Link Group, Barclays, Natixis Investment Managers, Chrysalis Investments, and DWS Group and are all investors to date in Smart.

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