



NEW EMPLOYEE CHECKLIST

Benefits:

- Schedule your preventive, maintenance, or follow-up visits (medical, dental and/or vision) to ease the transition to your new benefit plan at LPL.
- Fill (or refill) any preventive or maintenance prescriptions to ensure you have an adequate supply during the benefit transition period.
- Review your FSA balance vs. expenses incurred to ensure you've maximized your available balance and your contributions are not forfeited. If you have a balance in your Healthcare FSA and you know you will have unused funds, visit fsastore.com for options that may benefit you.

Onboarding:

- After receiving initiation for onboarding on 4/12, complete all onboarding documents including, policy, privacy as well as I-9 by 4/23.
- Complete additional background checks and compliance forms if you receive a request from LPL.
- Download the VIP access application to gain access to LPL systems, enabling you to select benefits, set up payroll, direct deposit, elect 401k and more.