



Financial Professional

Susan M. Wanamaker, CFP®

Beacon Financial Partners

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Phone: (216) 910-1881

12/30/2025

Associated with:

Lincoln Investment Planning, LLC

Capital Analysts, LLC

Principal Office:

601 Office Center Drive, Suite 300

Fort Washington, PA 19034

(800) 242-1421

www.lincolninvestment.com

www.capitalanalysts.com

This brochure provides information about Susan M. Wanamaker, who is dually licensed to offer broker dealer services through Lincoln Investment Planning, LLC and investment advisory services through Lincoln Investment Planning, LLC and/or Capital Analysts, LLC.

If you are opening an advisory account, this brochure supplements Lincoln Investment's and/or Capital Analysts' Form ADV 2A and Form ADV 2A Appendix I. If you do not receive the Investment Advisory Disclosure Brochures for the above listed registered investment advisers or if you have any questions about the contents of this supplement, please contact The Lincoln Investment Companies at (800) 242-1421, ext. 4770, option 4.

Additional information about Susan M. Wanamaker, is available via FINRA's BrokerCheck website at www.finra.org or the U.S. Securities and Exchange Commission's website at www.adviserinfo.sec.gov.

Item 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

Susan M. Wanamaker, CFP®

Year of Birth: 1960

Education

John Carroll University, M.S., Counseling, 1993

Boston College, MBA, Finance, 1987

John Carroll University, B.S., Psychology, 1982

Business Experience

Susan M. Wanamaker is dually registered as an Investment Adviser Representative and Registered Representative of a Broker-Dealer and one or more Registered Investment Advisers.

Investment Adviser Representative, Lincoln Investment, LLC, October 2024- Present

Investment Adviser Representative, Capital Analysts, LLC, July 2020 - Present

Registered Representative, Lincoln Investment Planning, LLC, July 2020 - Present

Registered Representative, Equitable Advisors, LLC, December 2019 - July 2020

Registered Representative, AXA Advisor, LLC, December 2019 - June 2020

Investment Advisor Representative, Fidelity Personal & Workplace Advisors, January 2019 - September 2019

Registered Representative, Fidelity Brokerage Services, LLC, October 2018 - September 2019

Financial Advisor, Merrill Lynch, Pierce, Fenner & Smith Inc., October 2016 - September 2018

Financial Advisor Associate, Morgan Stanley Private Bank, N.A., January 2015 - October 2016

Financial Advisor Associate, Morgan Stanley Smith Barney LLC, April 2013 - June 2015

Homemaker, Unemployed, January 2012 - April 2013

Financial Planner, Burkhart & Co., October 2010 - January 2012

Financial Planner, Gries Financial, September 2007 - September 2010

Consultant/Writer, Self Employed, December 2003 - May 2008

Teacher, Bucks County Community College, September 2001 - August 2007

Homemaker, Unemployed, September 1992 - September 2001

Financial Account Executive, International Management Group, September 1987 - September 1992

Professional Licenses/Designations

Susan M. Wanamaker holds the following industry exams or equivalency and Professional Designations.

Series 7 - General Securities Representative Examination

Series 66 - Uniform Combined State Law Examination

CERTIFIED FINANCIAL PLANNER® CFP®

Designation Status: Currently offered and recognized by the issuing organization

Issuing Organization: Certified Financial Planner Board of Standards, Inc.

Prerequisites: Candidate must meet the following requirements: A bachelor's degree (or higher) from an accredited college or university, and three years of full-time personal financial planning experience

Education Requirements: Candidate must complete a CFP-board registered program, or hold one of the following: CPA, ChFC, CLU, CFA, Ph.D. in business or economics, Doctor of Business Administration, Attorney's License.

Exam Type: CFP Certification Examination

Continuing Education Requirements: 30 hours every two years

Accreditation: NCCA and MSCHE

Item 3 – DISCIPLINARY INFORMATION

Susan M. Wanamaker has no material legal or disciplinary events to report.

Item 4 – OTHER BUSINESS ACTIVITIES

Investment Related Business Affiliations, Conflicts and Compensation

Susan M. Wanamaker is actively engaged in investment-related businesses as a registered representative of Lincoln Investment and an investment adviser representative of one or more investment advisers. Depending on the account type (brokerage or advisory), compensation to your Financial Professional will vary. Lincoln Investment and Capital Analysts limit the securities offerings and third party money managers available to your Financial Professional for recommendation. Your Financial Professional's recommendations will be in your best interest.

When you open a brokerage account, your Financial Professional will receive a transaction-based sales commission or concession based on the product acquired. Financial Professionals may also receive ongoing distribution and/or retention compensation from mutual funds and annuities. In brokerage accounts, conflicts arise from the varying compensation associated with different product type recommendations. Brokerage commissions and brokerage assets tied to Massachusetts residents are excluded from Lincoln's sales contests due to the Commonwealth of Massachusetts' Fiduciary Rule imposed on broker dealers. For Massachusetts' residents, this creates a financial incentive for your Financial Professional to recommend advisory services over brokerage services.

When you open an advisory account, Financial Professionals receive either a portion of the advisory fee assessed on assets they service, or a flat or hourly fee. Your Financial Professional is held to a fiduciary duty. It is each Financial Professional's responsibility to understand and adhere to the requirements of the Code of Ethics, as well as applicable laws, regulations, and rules.

Susan M. Wanamaker's involvement in other business activities as described below defines additional activities for which your Financial Professional could recommend other products or services to you. This creates a conflict of interest for your Financial Professional to promote these products or services in addition to the services described above.

Insurance Agent

Susan M. Wanamaker is licensed through Lincoln Investment or an independent agency to solicit, offer and sell insurance products. Your Financial Professional may be appointed with various insurance companies. Your Financial Professional may receive separate, yet customary commissions and other financial incentive compensation resulting from the purchases and sales of insurance products. When you purchase insurance products your Financial Professional will receive a transaction-based sales commission or concession based on the product acquired. Conflicts arise from the varying compensation associated with the recommendations made by your Financial Professional.

Other Businesses/Affiliations

Listed below are other businesses your Financial Professional is currently engaged in which provide either a substantial source of income and/or substantial amount of your Financial Professional's time. Also included are all businesses where your Financial Professional's role is as sole proprietor, officer, director or partner. These businesses are independently owned and not related or supervised by Lincoln Investment or Capital Analysts.

Susan M. Wanamaker is a Financial Advisor at Beacon Financial Partners; serves as a Board Member at Hearts and Hands of CASA, non-profit; and a Board Member at the Beachwood Chamber of Commerce.

Item 5 – ADDITIONAL COMPENSATION

Susan M. Wanamaker is permitted to participate in sales contests, incentives, gifts and entertainment offered by Lincoln Investment and/or Capital Analysts, at the Financial Professional's discretion and subject to applicable laws. Lincoln Investment monitors your Financial Professional's recommendations with the objective of ensuring recommendations are in the client's best interest. Our firm does not permit sales contests, sales quotas, bonuses, and non-cash compensation that are based on the sales of specific securities or specific types of securities within a limited period of time. Your Financial Professional is permitted to receive cash and non-cash compensation from third party product providers and money managers to assist with due diligence and marketing expenses. In order to mitigate the financial conflict associated with third party compensation, the maximum amount of marketing support reimbursement

and/or entertainment your Financial Professional is permitted to receive is \$1,000 from each product provider annually. Gifts from these third parties are limited to a value of \$100 annually. Product Providers are permitted to provide an occasional meal and/or nominal merchandise. For more information see The Lincoln Investment Companies Investor Agreement and Disclosure Handbook.

Item 6 – SUPERVISION

Susan M. Wanamaker is assigned to a Designated Supervisor. The Designated Supervisor, or his or her designee, will periodically review and monitor the advice and recommendations of your Financial Professional, their client communications, and your Financial Professional's adherence to the firms' Code of Ethics, policies and procedures to ensure that advice and recommendations are in the client's best interest.

Supervisor Name: Gregory Giller Randall

Title: Supervising Principal

Phone Number: (216) 910-1855