



Financial Professional BIO Brochure

Financial Professional

Susan M. Wanamaker, CFP®

Beacon Financial Partners

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Suite 110

Cleveland, OH 44122

Phone: (215) 275-4393

03/01/2026 Updated

Associated with:

Beacon Financial Advisory LLC

Principal Office:

25825 Science Park Drive, #110

Cleveland, Ohio 44122

216.910.1850

www.beaconplanners.com

This brochure provides information about Susan M. Wanamaker, who is dually licensed to offer broker dealer and investment advisory services.

If you are opening an advisory account, this brochure supplements Beacon Financial Advisory's Form ADV 2A. 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, Please contact Beacon Financial Advisory at 216.910.1850.

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 Planning, LLC, October 2024-Present
- Investment Adviser Representative, Beacon Financial Advisory LLC, November 2023-Present
- Investment Adviser Representative, Lincoln Investment Planning, LLC, October 2024-Present
- 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 - July 2020
- Investment Adviser Representative, Fidelity Personal & Workplace Advisors, October, 2018 - 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

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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.

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.

Independent Insurance Agent

Susan Wanamaker is licensed through Lincoln Investment or an independent agency to solicit, offer and sell insurance products. Your adviser may be appointed with various insurance companies.

Susan Wanamaker may receive separate, yet customary commission and other financial incentive compensation resulting from the purchases and sales of insurance products. You are under no obligation to purchase insurance products through Dale Rubin. All individuals that act as either broker dealer agents and/or investment advisor representatives are also licensed to offer insurance products to our clients. This may include traditional life insurance, annuities (fixed and equity indexed) and other insurance products that a client may have a need for. In this role, they will earn a commission on the sale of these products. This represents a potential conflict of interest which needs to be disclosed to our clients.

Lincoln Investment – Registered Representative – Susan Wanamaker is a registered representative of Lincoln Investment, a registered broker-dealer. Your adviser may offer the broker-dealer services of Lincoln Investment in addition to advisory services when making financial recommendations to you. If you purchase commissionable products through your adviser, your adviser will receive a commission, and in the case of mutual funds, possibly a 12b-1 fee. You are under no obligation to purchase commissionable securities products through Dale Rubin.

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.

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 for Beacon Financial Partners; and serves as 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 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 all advice and recommendations are in the client's best interest.

Supervisor Name: Deborah L. George

Title: Chief Compliance Officer

Phone Number: (216) 910-1865