



Financial Professional

Jonathan L. Mistofsky
FNA Wealth Management,
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Phone: (330) 405-7159

03-01-2026

Associated with the following affiliated Registered Investment Adviser:

Principal Office:

Beacon Financial Advisory LLC
25825 Science Park Drive, #110
Cleveland, OH 44122
(216) 910-1865

This brochure supplement provides information about Jonathan L. Mistofsky, an investment adviser representative herein referred to as "Your Adviser" that supplements the Form ADV2A which you should have already received.

Please contact Beacon Financial Advisory LLC at 216-910-1850, if you did not receive the Investment Advisory Disclosure Brochures for the above listed registered investment advisers or if you have any questions about the contents.

This brochure provides information about Jonathan L. Mistofsky, who is dually licensed to offer broker dealer and investment advisory services.

Additional information about Jonathan L. Mistofsky, 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.

EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

Jonathan L. Mistofsky

Year of Birth: 1979

Education

University of Strathclyde (Glasgow, Scotland), B.A. Hons, International Business and Modern Languages, 2002

Business Experience

Jonathan L. Mistofsky 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, August 2016 – Present

Registered Representative, Lincoln Investment Planning, LLC, August 2016 – Present

Registered Representative, Sterne Agee Financial Services, Inc., September 2014 – August 2016

Registered Representative, WRP Investments, Inc., January 2014 – September 2014

Unemployed, June 2013 – December 2013

Vice President, Optima Fund Management, September 2008 – June 2013

Professional Licenses/Designations

Jonathan L. Mistofsky holds the following industry exams or equivalency and Professional Designations.

Series 6 - Investment Company and Variable Contracts Products Representative Examination

Series 7 - General Securities Representative Examination

DISCIPLINARY INFORMATION

Jonathan L. Mistofsky has no material legal or disciplinary events to report.

OTHER BUSINESS ACTIVITIES

Lincoln Investment Registered Representative - Mr. Mistofsky 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 Mr. Mistofsky.

Investment Adviser Representative –Mr. Mistofsky is an investment Adviser representative with Lincoln Investment.

Lincoln Investment provides incentives, such as sales conferences, for financial advisers, the eligibility for which may be based on the number of advisory accounts or the total assets under management. This may present a potential conflict of interest. Lincoln Investment holds their Financial Advisers to a Code of Ethics and owe a fiduciary duty to all clients. Both firms require your Financial Adviser to place your interests above his or her own at all times and to avoid any recommendation that would not be in your best interest. It is each financial adviser's responsibility to understand and adhere to the requirements of the Code of Ethics, as well as applicable laws, regulations, and rules.

No client is under any obligation to purchase any non-investment related activities from this adviser. The above firms are independent and non-affiliated with the RIA.

Independent Insurance Agent -Mr. Mistofsky 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. Mr. Mistofsky 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 Mr. Mistofsky. 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.

Your Financial Professional'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

Jonathan L. Mistofsky 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.

ADDITIONAL COMPENSATION

Jonathan L. Mistofsky participates in sales contests, incentives, gifts and entertainment offered by Lincoln Investment, 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

Jonathan L. Mistofsky is assigned to a Designated Supervisor that is responsible for supervising your adviser's investment advisory activities.

Supervisor Name: Deborah L. George

Title: Chief Compliance Officer

Phone Number: 216-910-1865

The Designated Supervisor or his or her designee will periodically review the investment advisory activities, client communications, and your adviser's adherence to the registered investment adviser's Code of Ethics. In addition, the Designated Supervisor will monitor the advice being provided to ensure that your adviser is providing the services for which the adviser was engaged.