The IM&R Team

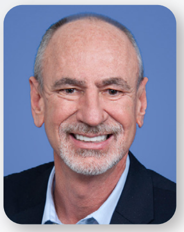
Your Wealth Architects

- Established track record and decades of combined experience
- Actively manages portfolios through investment decisions based on extensive research
- Practices due diligence with research to discover new programs and funds
- Sales support strategies using a combination of active and passive portfolio management
- Consultations to help advisors grow their business
- Over $9.9 billion under management and advisement*

**All information as of 12/31/2022: IM&R assets under management and advisement including Capital Analysts, Lincoln Investment and Strategist.*

Past performance is no guarantee of future results. Investing involves risk including the potential loss of principal. No investment strategy can predict the future, guarantee a profit or protect against loss in periods of declining values.

Meet the talented Investment Management & Research Team:



Steve Mayhew, CFA, CPA, CFP®

Senior Vice President and Chief Investment Officer
36 years industry experience

Steve Mayhew served as senior vice president for Capital Analysts before joining Lincoln Investment, where he was instrumental in setting asset allocation strategy. In 1986, he developed a proprietary strategic analysis program that rates mutual funds for consistency, risk, market cycle and long-term performance. The program is still used today.

Steve is a former chairperson for Financial Products Advisory Council of the Financial Planning Association and has served as an arbitrator for FINRA. He earned a bachelor's degree from Pennsylvania State University, and an MBA from Drexel University. He is also a graduate of the Securities Industry Institute Program at the Wharton School of the University of Pennsylvania.

Shashi Mehrotra, CFA

Senior Vice President and Chief Investment Strategist
29 years industry experience

Shashi Mehrotra served as chief operating officer and chief investment officer for the Legend Advisory division of the Lincoln Investment Companies. He is an early adopter of the application of using artificial intelligence for investment management and is the chief designer for the Asset Allocation Neural Network, a computer model that uses mathematical algorithms to forecast the relative strengths for different asset classes.

Shashi is a member of the CFA Institute and the South Florida Financial Analyst Society. He has earned a BS in engineering from the University of Osamania, Hyderbad, India, and an MBA from Florida Atlantic University.

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LINCOLN INVESTMENT

Jerry Burhop, CFA, CIPM®

Vice President and Portfolio Manager
28 years industry experience

Jerry joined Lincoln Investment in 1999 as a mutual fund analyst. Currently, Jerry is responsible for the development and management of the Progressive portfolios Dividend Income and Lincoln Strategic portfolios, as well as monitoring of the third-party strategists on the Solutions platform. He is also involved in the management of all Investment Management & Research managed portfolios.

Jerry earned a BS degree from the University of Wisconsin and an MBA from Temple University.

Chris Surrichio, CFA

Vice President and Portfolio Manager
28 years industry experience

Chris served as director of research with Capital Analysts for 10 years prior to joining Lincoln Investment in 2012. He now works as manager of the CAAMS portfolios and helps oversee the day-to-day functions of the investment management team with Lincoln Investment. His extensive professional experience is a valuable resource to financial advisors crafting portfolios for high net worth clients and writing proposals for institutions.

Chris earned a degree in economics from Boston College and has worked with Vanguard and Rightime Funds.

Brian Moran

Vice President of Trading
Fixed Income Portfolio Manager
31 years industry experience

Before joining Lincoln Investment as institutional trading manager in 2012, Brian was with Capital Analysts for more than a decade. Initially, he managed brokerage operations and trading, transitioning to institutional trading manager, as the Capital Analysts Asset Management Services (CAAMS) grew. Currently, Brian serves as director of trading for both brokerage and institutional trading, and as fixed income portfolio manager for CAAMS income strategies.

Brian graduated from the Wharton School of the University of Pennsylvania with a BS in economics. He also holds an MBA from Drexel University's LeBow College of Business.

continued

The IM&R Team

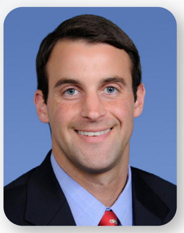
Your Wealth Architects

Meet the talented Investment Management & Research Team:

Ted O'Donoghue

Senior Research Analyst
21 years industry experience

Ted is a graduate of Bucknell University with a BA in economics. He has also earned an MBA in investment management and finance from Pennsylvania State University. Ted joined Lincoln Investment in 2012 as a mutual fund analyst before his promotion to his current role.



Greg Bender, CFA

Manager, Institutional Trading
13 years industry experience

Greg is a graduate of Elon University with a BS in finance. He joined Lincoln Investment in 2015 as an institutional trader and was promoted to his current role as manager.

Tom Lavery

Senior Investment Analyst
12 years industry experience

Tom joined Legend Advisory in 2011. He currently serves as a senior investment analyst, and holds a BS in business administration from the University of Florida.

Steve Mueller, CFA

Senior Research Analyst
11 years industry experience

Steve is a graduate of Temple University with a BS in business administration. He worked with Lincoln Investment as an intern, and joined full-time as an internal wholesaler in 2013 before moving into his current role.

Ami Friedman

Investment Analyst
11 years industry experience

Ami, an investment analyst, joined Legend Advisory in 2014. He holds a BA in mathematics and physics from Yeshiva University.

Dylan Devine, CFA

Research Analyst,
Institutional Trading
9 years industry experience

Dylan joined Lincoln Investment in early 2019 as an investment analyst. He holds a BS in business administration from Kutztown University of Pennsylvania.

Aleksandra Tammer, CFA

Senior Investment Analyst
8 years industry experience

Aleksandra, a senior investment analyst, joined Legend Advisory in 2015. She holds a BS in mathematics and a minor in economics from Tulane University.

Jeremy Brown

Institutional Trader
6 years industry experience

Jeremy Brown joined Lincoln Investment in 2020 as a Securities Trader. He is a graduate of Temple University where he earned both his BS in 2014 and his MBA in 2021.

Brian Pias

Junior Analyst
6 years industry experience

Brian Pias is a Junior Analyst and joined Legend Advisory in 2016 as a part of Advisory Operations before being promoted to his current role. He holds a BS in Political Science from Florida State University.

Kandarp Shah

Research Analyst/Institutional Trader
5 years industry experience

Kandarp joined Lincoln Investment in July 2018 as Securities Trader and was promoted to his current role as Research Analyst/Institutional Trader. He holds a Bachelor of Arts in Finance and MBA in Management.