

NEWS RELEASE



Curtis Wilcox and Paul Niemiec Join Lincoln Investment

Fort Washington, PA – March 30, 2026 – Lincoln Investment Planning, LLC (Lincoln Investment), a leading provider of financial planning, investment advisory and retirement solutions, announced that financial advisors **Curtis Wilcox and Paul Niemiec** have joined Lincoln Investment’s Broker-Dealer and Registered Investment Adviser. Wilcox and Niemiec were introduced to the firm through WealthGuide Advisors, an ensemble of financial advisors already affiliated with Lincoln Investment. They will be doing business as Blue Harbor Wealth Management. The team reported previously advising on approximately \$250 million in client assets and joins the firm from Corebridge Financial. Wilcox and Niemiec look forward to delivering comprehensive financial guidance and personalized service to Lincoln clients.

Wilcox, who has more than 18 years of experience in the financial services industry, specializes in helping individuals and families build long-term financial independence through disciplined investment strategies and thoughtful financial planning. Niemiec partners closely with clients to deliver tailored wealth management strategies designed to meet their evolving financial goals.

The transition of Wilcox and Niemiec to Lincoln Investment reflects a desire to expand their capabilities and provide investors with enhanced planning tools, resources and investment solutions.

“Curtis and Paul represent the type of experienced, client-focused advisors who align perfectly with our culture,” said Khai Le, Managing Partner, WealthGuide Advisors. “Their dedication to delivering high-quality financial advice and long-term relationships makes them an excellent addition to our growing branch.”

Wilcox said the move will allow the team to continue delivering the high level of service that investors should expect while gaining access to additional planning resources and technology.

"The firm's mission is to bring clarity, confidence and comfort to all clients. Being independent allows us to focus on our clients' needs by offering quality client service and providing tailored strategies to each of our client's goals," said Wilcox. "We were

drawn to Lincoln Investment's advisor-focused culture and existing relationships with other advisors who've made successful transitions."

The team will serve investors with a focus on comprehensive financial planning, retirement planning and investment management.

About Lincoln Investment

With over 57 years of proven industry leadership and experience in delivering investment strategies, Lincoln Investment is a leading broker-dealer. Its network includes over 1,000 financial professionals nationwide representing over \$55 billion in assets. For more information, visit www.lincolninvestment.com or follow on [LinkedIn](#), [X](#) or [Facebook](#).

About WealthGuide Advisors

WealthGuide Advisors is dedicated to leveraging its two decades of diverse experience to provide comprehensive financial guidance and customized solutions to a diverse clientele including Silicon Valley professionals, small business owners, educators, healthcare workers and public employees. For more information, visit <https://WealthGuideAdvisors.com> or follow on [LinkedIn](#).

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