

NEWS RELEASE



Lincoln Investment Announces New Chief Information and Technology Officer and Chief Business Development Officer

Fort Washington, PA – August 14, 2025 – Lincoln Investment Planning, LLC (Lincoln Investment) announced the addition of two new employees to its executive leadership team effective July 28, 2025. Jason Estes was named Chief Information and Technology Officer and Dan Alexander was appointed Chief Business Development Officer.

Estes is responsible for leading the firm's technology strategy, overseeing digital transformation initiatives and modernizing IT platforms to support the continued growth of Lincoln's financial professional network and client base.

Estes brings over 20 years of leadership experience in information technology and digital innovation, with deep expertise in financial services, consulting and enterprise-scale transformation. Most recently, he served as Chief Information and Digital Officer at First Command Financial Services, where he led infrastructure, application development, enterprise architecture and cybersecurity efforts supporting a complex ecosystem of bank, RIA, insurance and broker-dealer entities.

During his tenure at First Command, Estes spearheaded major modernization initiatives, including the implementation of cloud-native architecture, the establishment of nearshore agile development operations and the deployment of enterprise-wide integration patterns. His leadership was instrumental in improving platform reliability, advisor enablement and digital client engagement across the organization.

"Lincoln's mission to serve financial professionals and their clients with excellence is one I deeply respect," said Estes. "I'm excited to join a firm with such a strong foundation and growth trajectory, and I look forward to partnering across the organization to build modern, scalable technology that advances the financial professional and client experience."

As Chief Business Development Officer, Dan Alexander is responsible for driving the firm's revenue growth, developing and executing strategic plans to compete in the

marketplace and increasing Lincoln's financial professional network with continued branch growth and effective retention strategies.

Before joining Lincoln, Alexander co-founded RetireAware in 2017, a firm dedicated to market transparency providing consulting services to retirement plans, record-keepers, registered investment advisers and third-party administrators. Alexander served as a consultant to Lincoln supporting the firm's retirement, recruiting & transition team strategy. Prior to RetireAware, Alexander was the Midwest Regional Vice President for VALIC (now Corebridge Financial.)

"After years of working alongside Lincoln Investment, I've seen firsthand their deep commitment to empowering financial professionals and delivering exceptional outcomes for clients," said Alexander. "I'm excited to join a firm whose values align with mine, where growth is driven by transparency, service excellence and a focus on financial professional and client success."

Estes and Alexander join Lincoln Investment CEO Ed Forst, President and Chief Operating Officer Kathy Leckey, Chief Financial Officer Diane McCarthy, General Counsel and Chief Compliance Officer Maureen Mattson and Chief Human Resources Officer Steven Flax to complete the Executive Leadership team.

"This is an exciting time for Lincoln. Ed and I know that this field-facing leadership team has the talent and drive to take Lincoln into the future," said President and Chief Operating Officer Kathy Leckey.

About Lincoln Investment

With over 56 years of proven industry leadership and experience in delivering investment strategies, Lincoln Investment is a leading broker-dealer. Its network includes about 1,000 financial professionals nationwide representing \$55 billion in assets. Lincoln was voted one of the Top Workplaces in the Delaware Valley for the 15th consecutive year in 2024. For more information, visit www.lincolninvestment.com or follow on [LinkedIn](#), [X](#) or [Facebook](#).

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