

NEWS RELEASE



Lincoln Investment Appoints Anthony Bueti as Chief Operating Officer to Scale Enterprise Operations for Wealth Management Firm

The appointment of Anthony Bueti furthers a strategic leadership restructuring aimed at enhancing advisor experience and operational efficiency for the \$60B wealth management firm.

Fort Washington, PA – April 28, 2026 – Lincoln Investment Planning, LLC (Lincoln Investment), a leading full-service broker-dealer and registered investment adviser, announces the appointment of Anthony Bueti as Chief Operating Officer (COO). This announcement is vital for financial professionals and clients of Lincoln Investment as it signals a finalized phase of executive scaling designed to support the firm’s over \$60 billion in client assets under representation and its network of over 1,000 financial professionals.

The Strategic Evolution of Lincoln Investment Leadership

This appointment is the cornerstone of a multi-year executive transition strategy focused on execution, scale and long-term growth. By aligning operational leadership with technological and business development initiatives, Lincoln Investment positions itself to navigate the evolving regulatory and digital landscape of the wealth management industry.

Recent Key Executive Appointments:

- **Kathy Leckey, President:** Appointed to lead the firm’s overall strategic direction.
- **Anthony Bueti, Chief Operating Officer:** Tasked with enterprise-wide execution and operational controls.
- **Jason Estes, Chief Information and Technology Officer:** Focused on digital transformation and advisor-facing technology.
- **Dan Alexander, Chief Business Development Officer:** Driving advisor recruitment and firm-wide growth initiatives.

What This Means for Financial Professionals and Clients

As COO, Bueti will oversee firmwide Operations and Service functions, while also playing a central role in shaping firm strategy and ensuring alignment with enterprise priorities.

This dual focus directly influences the way the firm delivers its mission to empower financial professionals to help investors reach their long-term retirement goals. For the firm's 1,000+

professionals, this means a more integrated, strategically aligned operating model, one that reduces administrative friction, strengthens execution and delivers a more seamless end-client experience.

Key Operational Capabilities

Under Bueti's leadership, Lincoln Investment focuses on several core areas of operational excellence:

- **Scalable Enterprise Growth:** Implementation of automated workflows to support increasing asset volumes.
- **Enhanced Operational Controls:** Strengthening risk management frameworks and FINRA/SEC compliance protocols.
- **Service Model Integration:** Partnering across departments to ensure a seamless transition between technology tools and human support.
- **Advisor Productivity:** Refining back-office processes to allow financial professionals more time for client-facing activities.

Authority and Validation

Lincoln Investment remains a prominent figure in the independent broker-dealer space, backed by:

- **57+ Years of Industry Leadership:** Continuous operation as a privately held firm since 1968.
- **Scale of Impact:** Managing over \$60 billion in client assets nationwide.
- **2025 IBD Elite:** Top 25 Independent Broker-Dealer Elite 2025 (ranking conducted by Financial Planning).

Issued August 13, 2025, the annual IBD Elite ranking conducted by Financial Planning contains data on 38 firms and their 2024 revenue, as reported by the firms themselves. Working with an award winner is no guarantee of future financial success. Individuals should conduct their own evaluation. Firms do not pay a fee to *Financial Planning* in exchange for inclusion in the Financial Planning IBD Elite ranking list but may pay for advertising rights. Source: www.financial-planning.com.

Frequently Asked Questions

What is Anthony Bueti's background at Lincoln Investment?

Anthony Bueti has been with Lincoln Investment since 2015. He has over 24 years of financial services experience and previously served in multiple senior leadership roles within the firm's operations and service divisions before being named COO.

Who is the Chief Operating Officer of Lincoln Investment?

Anthony Bueti is the Chief Operating Officer of Lincoln Investment. He was appointed to the role to oversee enterprise-wide execution and strengthen operational controls as part of the firm's executive leadership team.

How does Lincoln Investment support financial professionals?

Lincoln Investment provides a comprehensive suite of investment strategies, technology platforms and operational support to over 1,000 financial professionals. The firm focuses on helping advisors scale their practices through enhanced service models and diverse product offerings.

What is the size and scale of Lincoln Investment?

Lincoln Investment represents over \$60 billion in client assets and serves a national network of over 1,000 financial professionals. The firm has been in operation for over 57 years.

Executive Perspectives

“These leadership decisions reflect how intentionally we are building for the future,” said Kathy Leckey, President of Lincoln Investment. “Anthony brings deep operational expertise and a collaborative leadership style that will help us execute our strategy while continuing to support our financial professionals, clients and employees.”

“In this expanded role, I will take an enterprise-wide view of execution,” said Anthony Bueti, COO. “By strengthening our operational controls and focusing on scalable growth, while keeping advisor and client experience as a key outcome, we are ensuring that our infrastructure can support the sophisticated needs of our advisors and their clients.”

Learn More

- Executive Leadership Profiles:
 - [Kathy Leckey](#), President
 - [Dan Alexander](#), Chief Business Development Officer
 - [Jason Estes](#), Chief Information and Technology Officer
- [Wealth Management Growth Strategy](#)
- [Lincoln Investment Official Website](#)

About Lincoln Investment

With over 57 years of proven industry leadership and experience in delivering investment strategies, Lincoln Investment is a leading broker-dealer and registered investment adviser. Its network includes over 1,000 financial professionals nationwide representing over \$60 billion in client assets. For more information, visit www.lincolninvestment.com or follow on [LinkedIn](#), [X](#) or [Facebook](#).

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