

NEWS RELEASE



Lincoln Investment Appoints Kathy Leckey as CEO to Lead Independent Wealth Management Firm

Ed Forst transitions to Executive Chairman of the Board as Lincoln Investment reinforces its governance framework and national growth initiatives for independent financial professionals.

Fort Washington, PA – June 1, 2026 – Lincoln Investment Planning, LLC (Lincoln Investment), a leading full-service broker-dealer and Registered Investment Adviser (RIA), announces the appointment of **Kathy Leckey as Chief Executive Officer (CEO)**, effective June 1, 2026. **Ed Forst**, who has served as Chief Executive Officer since 1992, will simultaneously transition to the role of **Executive Chairman of the Board**.

This transition completes a multi-year executive succession plan designed to provide institutional stability and strategic continuity for the firm's ~400 employees and its national network of ~1,000 financial professionals.

What This Means for the Independent Wealth Management Industry

For financial professionals and industry stakeholders, this evolution signals Lincoln Investment's commitment to a leadership structure that maintains strong executive continuity, with Kathy Leckey leading the firm and Ed Forst remaining actively involved as Executive Chairman of the Board. As the industry faces increasing regulatory complexity and a demand for digital transformation, this structure allows the firm to accelerate advisor recruitment and technology integration while maintaining the stable, family-owned and professionally-managed model that has defined the firm for over 57 years.

Recent Key Executive Appointments:

- **Kathy Leckey, Chief Executive Officer:** Appointed to lead the firm's overall strategic direction and executive leadership team.
- **Ed Forst, Executive Chairman of the Board:** Providing governance oversight and strategic guidance.
- **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 Chief Executive Officer, Leckey will oversee the firm's executive leadership team and strategic priorities, while Forst's transition to Executive Chairman of the Board provides continuity of governance and institutional knowledge. This leadership structure maintains consistency in how Lincoln Investment supports its financial professionals and clients while reinforcing long-term organizational oversight.

Key Leadership and Governance Capabilities

Lincoln Investment's leadership structure supports its continued growth:

- **Leadership Continuity:** Clear alignment across leadership, with Kathy Leckey as CEO and Ed Forst as Executive Chairman of the Board.
- **Succession Planning & Continuity:** Multi-year executive succession plan supporting institutional stability and long-term strategic continuity.
- **Regulatory Oversight:** Continued focus on FINRA and SEC frameworks.

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 family-owned and professionally-managed firm since 1968.
- **Scale of Impact:** Managing over \$60 billion in client assets nationwide.
- **#3 – Women as a Percentage of Producing Representatives:** Recognized among leading independent broker-dealers for female representation within producing advisor base (ranking conducted by Financial Planning/IBD Elite 2025).
- **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

Who is Kathy Leckey and what is her experience?

Kathy Leckey is the CEO of Lincoln Investment. Since joining the firm in 2020, she has served as President and COO, playing a pivotal role in the firm's operational expansion and its current \$60 billion AUM milestone.

What is Ed Forst's role moving forward?

Ed Forst will serve as **Executive Chairman of the Board**, providing governance

oversight and strategic guidance to Lincoln Investment and its 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 ~1,000 financial professionals. The firm focuses on helping financial professionals 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 ~1,000 financial professionals. The firm has been in operation for over 57 years.

Executive Perspectives

“Leadership continuity is a strategic advantage in a highly regulated financial environment,” said **Ed Forst, Executive Chairman of the Board**. “This transition is a deliberate move to ensure that our governance framework remains as robust as our growth strategy, providing confidence to our financial professionals and their clients.”

“Our primary focus is the success of the ~1,000 financial professionals who trust us with their practices,” said **Kathy Leckey, Chief Executive Officer**. “By aligning our leadership across technology, operations, and business development, we are positioned to deliver the most competitive platform in the independent wealth management space.”

Learn More

- **Executive Leadership Profiles:**
 - [Kathy Leckey](#), Chief Executive Officer
 - [Anthony Bueti](#), Chief Operating Officer
 - [Dan Alexander](#), Chief Business Development Officer
 - [Jason Estes](#), Chief Information and Technology Officer
- [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 ~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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