

# NEWS RELEASE



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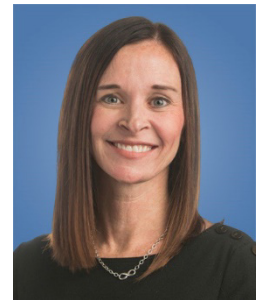
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## **Lincoln Investment Announces Kathy Leckey as Its New President**

**Fort Washington, PA – March 26, 2025** – Lincoln Investment Planning, LLC (Lincoln Investment) President and CEO Ed Forst announced in December 2024 that Chief Operating Officer Kathy Leckey will succeed him as president effective immediately. Forst will remain in his role as CEO. Leckey holds the distinction as the first president in Lincoln Investment’s history who is not a member of the Forst family. Ed Forst held the position since 1992 succeeding his father, Nick Forst, who founded the company in 1968 with a vision to bring the power of investing to all people.



Starting her career at Lincoln Investment after high school in 1993, Leckey returned to the company in 2020 as chief of staff to President and CEO Ed Forst and was promoted to chief operating officer in 2022 to support the business with a defined lens on the client and advisor experience. Leckey has a reputation for building best-in-class leadership teams and is responsible for leading the organizational growth strategy of the firm. Leckey has over 30 years of experience in financial services, strategic planning, sales, distribution, talent recruitment and transformational initiatives for Fortune 100 companies. She has held leadership roles at PLANCO/Hartford, Equitable, MetLife, Lincoln Financial Distributors and Prudential. She is a graduate of LaSalle University with a BS in business administration and earned an MBA in organizational strategy from St. Joseph’s University. Leckey is currently attending Columbia University focusing on her CEO certification.

Leckey was at the helm of Lincoln Investment’s largest transformation in its 56-year history moving off a self-clearing and custody platform to a fully-disclosed platform with BNY Pershing last November. The new strategic arrangement, which includes BNY Pershing Wove, addresses the company’s need for enhanced technology, product solutions and a unified platform to meet advisor/consumer demands that supports Lincoln’s ability to deliver on strategic enterprise initiatives into the future.

“Kathy is an employee who possesses many exceptional traits – dedicated, hard-working, collaborative and is a hands-on, authentic leader focused on culture,” said Ed Forst. “My father would be very pleased that an employee he knew and hired many years ago has been selected as president.”

Leckey's appointment aligns with the company's support and advancement of women in the financial services industry. In addition to Leckey, its executive suite includes Chief Compliance Officer Maureen Mattson and Chief Financial Officer Diane McCarthy. The company ranked #6 for the most female financial advisors in the independent broker-dealer space (2024 Financial Planning's Independent Broker-Dealer list ranking\*) and is committed to actively recruiting female professionals in the industry.

"I am deeply honored and humbled to be the first non-family member to be named President. This opportunity fills me with a profound sense of responsibility to continue a legacy of excellence that this company is renowned for. I am eager to lead such a talented and dedicated team into a future brimming with potential and possibility. My vision for the company's future is anchored in three core pillars: transformation, growth and a focus on culture."

### **About Lincoln Investment**

With over 55 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. The company serves the diverse financial needs of over 315,000 clients representing over \$51 billion in assets. Lincoln has been voted one of the Top Workplaces in the Delaware Valley for the 15th consecutive year. For more information, visit [www.lincolninvestment.com](http://www.lincolninvestment.com) or follow on [LinkedIn](#), [X](#) or [Facebook](#).

\* Rankings are not indicative of future performance and are no guarantee of future financial success. Issued 8/14/24, Financial Planning's annual IBD Elite Rankings are based on 41 companies using data from Jan-Dec 2023. Firms do not pay a fee to be included in the IBD Elite Rankings list.