Financial Planning Center of Excellence (FPCOE)

FPCOE is an in-house team of accredited professionals offering full-service financial planning resources and assistance to financial professionals. We partner with financial professionals and help them build comprehensive, customized financial plans to help them identify opportunities to advantage you.

We Help Our Financial Professionals:

- Select financial planning software and provide training
- Identify clients for planning
- Gather and organize client data
- Solve for goals and concerns
- Compare different scenarios and develop the financial plan
- Present an impactful presentation
- Identify next steps and ask for the business

What We Analyze:

- Target retirement age(s)
- Social Security maximization
- Cash flow
- Tax minimization strategies
- Investment strategies
- Goal funding
- Education planning
- Estate planning
- Debt management
- Risk mitigation and protection strategies

Why FPCOE?

- Receive comprehensive, compliance-approved financial plans in a timely fashion
- Free your time to focus on gathering assets and building relationships
- Available for client meetings or calls during any stage of the financial planning process
- No cost to financial professionals

Contact your financial professional to learn how they can help you grow your business.

LINCOLN INVESTMENT

601 Office Center Drive | Fort Washington, PA 19034 | 800-242-1421 | www.lincolninvestment.com

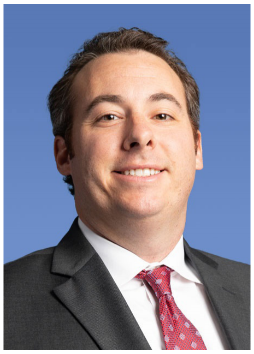
Financial Planning Center of Excellence Team

Frank Rosala, CFP®

Manager, Financial Planning & Packaged Products

Frank joined Lincoln Investment in January 2022 and comes with 25 years of experience in the financial services industry, including being a Financial Advisor with Merrill Lynch and Smith Barney and a Regional Sales Director for Prudential Annuities. He also trained and educated advisors on retirement planning and investment products, regularly conducting continuing educations seminars and webinars.

Frank graduated from Villanova University with a B.A. in Finance. He currently holds his FINRA Series 7 & 66 securities registrations. In 2018, he obtained his CERTIFIED FINANCIAL PLANNER™ designation.



Joe DiCriscio, CFP®

Financial Planning Consultant

Joe joined Lincoln Investment in January 2022 as a Financial Planning Support Consultant. He is a graduate of the Rutgers School of Business with a Bachelor's of Applied Science in Finance and is pursuing his MBA from the Fox School of Business at Temple University. In addition, Joe has received his FINRA Series 7 and 66 securities registrations and his Life & Health Insurance license.

Joe joins us from Wealth CMT, where he served as a Financial Planning Analyst generating wealth plans for clients by projecting cost-of-living, income(s), assets, liabilities and insurances in accordance with a clients' goals, objectives and milestones. He also worked for Lincoln Financial Group assisting advisors nationwide on products, procedures, new business, cashiering, transfer of assets and trading.

Eli Vottero, RSSA®

Financial Planning Consultant

Eli joined Lincoln Investment in 2018 as a Financial Analyst and transitioned to the Practice Management team in 2022. He has 10 years of experience in various capacities in the financial services industry, including financial operations, forecasting, financial modeling, practice analytics as well as financial planning.

Eli graduated from Immaculata University with a B.S. in Finance and Business Administration. He currently holds his FINRA Series 7 & 66 securities registrations, the Pennsylvania life/health insurance license, and the Registered Social Security Analyst® designation.