

# ISA's Dedication to Clients

With almost 50 years of proven industry leadership and expertise in delivering investment strategies, Lincoln Investment is a broker/dealer of choice. Our network has grown to over 800 financial advisors nationwide, and we serve the diverse financial needs of over 235,000 clients representing nearly \$24.7 billion in assets.

At Lincoln Investment, we treat each client relationship as the most important part of our business. We're proud to be recognized as one of the fastest-growing independent broker/dealers in the industry, and we stand out in our community as a top workplace for employees.

## Our Investor Services Advisor (ISA) Team

Based in our home office in Fort Washington, PA, our Investor Services Advisor team (ISA) is comprised of dedicated, results-driven Lincoln Investment advisors who work with individuals and families to help you achieve your long-term financial and retirement goals.

### ISA's Mission & Culture

Put simply, we believe that our job is to help clients. Every decision we make starts there. Our goal, in turn, is to lead clients to make great decisions that improve your financial health, and bring you and your family closer to achieving your financial objectives — through education, advice, and ongoing support. We do this by fostering a culture of leadership, innovation, flexibility, and collaboration.

### ISA's Commitment

Our advisors are committed to offering you the highest-quality products, services, and technology-based tools in the industry. You can count on us to deliver results that bring about positive change — and keep you on the path to financial security.

## Our Process



Set Objectives > Gather Data > Analyze Data > Recommend > Implement > Monitor/ Review Progress

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## Our Investment Philosophy

We focus on these four key investment categories, to help you build and maintain a portfolio comprised of the products that best suit your long-term objectives.

Cash Reserves/  
Spending

Insurance/  
Risk management

Equity Assets

Fixed Income  
Assets

## 6 Key Areas of Financial Planning

To implement a financial planning strategy that works best for you, we'll address these six critical areas — in order to present a comprehensive solution that covers all aspects of your financial life.

- Current Situation
- Risk Mitigation
- Tax Planning
- Wealth Accumulation
- Estate Planning
- Retirement Planning



**For more information or to schedule a consultation, contact one of our ISA advisors today! Call 800-242-1421 ext. 7695 or email us at [TLakatos@lincolninvestment.com](mailto:TLakatos@lincolninvestment.com).**

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*Advisory services offered through Capital Analysts or Lincoln Investment, Registered Investment Advisors.  
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