



**Financial Professional**

David George Olson, ChFC®  
Beacon Financial Partners  
25825 Science Park Dr.  
Suite 110  
Cleveland, OH 44122  
Phone: (216) 906-6465

**6/15/2020**

**Associated with:**

Lincoln Investment Planning, LLC  
Capital Analysts, LLC

Principal Office:  
601 Office Center Drive, Suite 300  
Fort Washington, PA 19034  
(800) 242-1421

[www.lincolninvestment.com](http://www.lincolninvestment.com)

[www.capitalanalysts.com](http://www.capitalanalysts.com)

This brochure provides information about David George Olson, who is dually licensed to offer broker dealer and investment advisory services.

If you are opening an advisory account, this brochure supplements Lincoln Investment's and/or Capital Analysts' Form ADV 2A and Form ADV 2A Appendix I. If you do not receive the Investment Advisory Disclosure Brochures for the above listed registered investment advisers or if you have any questions about the contents of this supplement, please contact The Lincoln Investment Companies at (800) 242-1421, ext. 4770, option 4.

Additional information about David George Olson, is available via FINRA's BrokerCheck website at [www.finra.org](http://www.finra.org) or the U.S. Securities and Exchange Commission's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).

## **Item 2 – EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE**

David George Olson, ChFC®

Year of Birth: 1963

### **Education**

Wharton School, University of Pennsylvania, MBA, 1990

Tufts University, B.A., 1985

### **Business Experience**

David George Olson is dually registered as an Investment Adviser Representative and Registered Representative of a Broker-Dealer and one or more Registered Investment Advisers.

Investment Adviser Representative, Capital Analysts, LLC, June 2012 – Present

Investment Adviser Representative, Lincoln Investment Planning, LLC, June 2012 – Present

Registered Representative, Lincoln Investment Planning, LLC, June 2012 – Present

Financial Advisor, Capital Analysts, Incorporated, 2010 – June 2012

Registered Representative, Sanders Morris Harris Inc., 2007 – 2010

Registered Representative, Lincoln Financial, 1992 – 2007

### **Professional Licenses/Designations**

David George Olson holds the following industry exams or equivalency and Professional Designations.

Series 4 - Registered Options Principal Examination

Series 6 - Investment Company and Variable Contracts Products Representative Examination

Series 7 - General Securities Representative Examination

Series 63 - Uniform Securities Agent State Law Examination

### **Chartered Financial Consultant ChFC®**

Designation Status: Currently offered and recognized by the issuing organization

Issuing Organization: The American College

Prerequisites: Three years of full-time business experience within the five years preceding the awarding of the designation

Education Requirements: Six core and two elective courses

Exam Type: Final proctored exam for each course

Continuing Education: 30 CE credits every two years

Accreditation: MSCHE

## **Item 3 – DISCIPLINARY INFORMATION**

David George Olson has no material legal or disciplinary events to report.

## **Item 4 – OTHER BUSINESS ACTIVITIES**

### **Investment Related Business Affiliations, Conflicts and Compensation**

David George Olson is actively engaged in investment-related businesses as a registered representative of Lincoln Investment and an investment adviser representative of one or more investment advisers.

Depending on the account type (brokerage or advisory), compensation to your Financial Professional will vary. Lincoln Investment and Capital Analysts limit the securities offerings and third party money managers available to your Financial Professional for recommendation. Your Financial Professional's recommendations will be in your best interest.

When you open a brokerage account, your Financial Professional will receive a transaction-based sales commission or concession based on the product acquired. Financial Professionals may also receive

ongoing distribution and/or retention compensation from mutual funds and annuities. In brokerage accounts, conflicts arise from the varying compensation associated with different product type recommendations. Effective 9/1/2020, brokerage commissions and brokerage assets tied to Massachusetts residents are excluded from Lincoln's sales contests due to the Commonwealth of Massachusetts' Fiduciary Rule imposed on broker dealers that is effective 9/1/2020. For Massachusetts' residents, this creates a financial incentive for your Financial Professional to recommend advisory services over brokerage services.

When you open an advisory account, Financial Professionals receive either a portion of the advisory fee assessed on assets they service, or a flat or hourly fee. Your Financial Professional is held to a fiduciary duty. It is each Financial Professional's responsibility to understand and adhere to the requirements of the Code of Ethics, as well as applicable laws, regulations, and rules.

David George Olson's involvement in other business activities as described below defines additional activities for which your Financial Professional could recommend other products or services to you. This creates a conflict of interest for your Financial Professional to promote these products or services in addition to the services described above.

### **Independent Registered Investment Adviser**

David George Olson is also an investment adviser representative of a non-affiliated investment adviser, Beacon Financial Advisory LLC.

### **Insurance Agent**

David George Olson is licensed through Lincoln Investment or an independent agency to solicit, offer and sell insurance products. Your Financial Professional may be appointed with various insurance companies. Your Financial Professional may receive separate, yet customary commissions and other financial incentive compensation resulting from the purchases and sales of insurance products. When you purchase insurance products your Financial Professional will receive a transaction-based sales commission or concession based on the product acquired. Conflicts arise from the varying compensation associated with the recommendations made by your Financial Professional.

### **Other Businesses/Affiliations**

Listed below are other businesses your Financial Professional is currently engaged in which provide either a substantial source of income and/or substantial amount of your Financial Professional's time. Also included are all businesses where your Financial Professional's role is as sole proprietor, officer, director or partner. These businesses are independently owned and not related or supervised by Lincoln Investment or Capital Analysts.

David George Olson is the partial owner of American Punch Company and Firth Holdings, LLC.; Treasurer on the Board of Directors; Finance Committee for the International Burn Foundation; and Chairman of the Endowment Committee and Endowment Investment Committee for the Forest Hill Church.

### **Item 5 – ADDITIONAL COMPENSATION**

David George Olson participates in sales contests, incentives, gifts and entertainment offered by Lincoln Investment and/or Capital Analysts, subject to applicable laws. Lincoln Investment monitors your Financial Professional's recommendations with the objective of ensuring recommendations are in the client's best interest. Our firm does not permit sales contests, sales quotas, bonuses, and non-cash compensation that are based on the sales of specific securities or specific types of securities within a limited period of time. Your Financial Professional is permitted to receive cash and non-cash compensation from third party product providers and money managers to assist with due diligence and marketing expenses. In order to mitigate the financial conflict associated with third party compensation, the maximum amount of marketing support reimbursement and/or entertainment your Financial Professional is permitted to receive is \$1,000 from each product provider annually. Gifts from these third parties are limited to a value of \$100 annually. Product Providers are permitted to provide an occasional meal and/or nominal merchandise. For more information see The Lincoln Investment Companies Investor Agreement and Disclosure Handbook.

## **Item 6 – SUPERVISION**

David George Olson is assigned to a Designated Supervisor. The Designated Supervisor, or his or her designee, will review and monitor the advice and recommendations of your Financial Professional, their client communications, and your Financial Professional's adherence to the firms' Code of Ethics, policies and procedures to ensure that all advice and recommendations are in the client's best interest.

Supervisor Name: Gregory Giller Randall

Title: Supervising Principal

Phone Number: (440) 543-8993