

*This brochure supplement provides information about Scott Wilbur Lucas that supplements the Touchstone Capital, Inc. brochure. You should have received a copy of that brochure. Please contact Scott Wilbur Lucas if you did not receive Touchstone Capital, Inc.'s brochure or if you have any questions about the contents of this supplement.*

*Additional information about Scott Wilbur Lucas is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **Touchstone Capital, Inc.**

### **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

### **Scott Wilbur Lucas**

Personal CRD Number: 6389274

Investment Adviser Representative

Touchstone Capital, Inc.  
2607 Nicholson Road, Building II Suite 1100  
Sewickley, PA 15143  
(724) 933-8388  
[slucas@touchstonecapital.com](mailto:slucas@touchstonecapital.com)

UPDATED: 02/12/2019

## Item 2: Educational Background and Business Experience

**Name:** Scott W. Lucas      **Born:** 1972

### Educational Background and Professional Designations:

#### Education:

Masters Degree Educational Studies (counseling), Duquesne University - 2003  
Bachelor of Science Environmental Science, Westminster College - 1995  
Certified Estate Planning and Trust Specialist - 2016

#### Business Background:

09/2015 - Present	Investment Adviser Representative Touchstone Capital, Inc.
03/2015 – 06/2017	Registered Representative Commonwealth Financial Network
02/2006 - 09/2015	Independent Insurance Agent/Owner Lucas Insurance
04/2000 – 07/2007	President Strategic Cost Recovery, LLC

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

Scott Wilbur Lucas is a licensed insurance agent with Lucas Insurance. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Touchstone Capital, Inc. always acts in the best interest of the client; including in the sale of commissionable products to advisory

clients. Clients are in no way required to implement the plan through any representative of Touchstone Capital, Inc. in their capacity as a licensed insurance agent.

### **Item 5: Additional Compensation**

Scott Wilbur Lucas does not receive any economic benefit from any person, company, or organization, other than Touchstone Capital, Inc. in exchange for providing clients advisory services through Touchstone Capital, Inc.

### **Item 6: Supervision**

As a representative of Touchstone Capital, Inc., Scott Wilbur Lucas is supervised by Theodore Kerr, the firm's Chief Compliance officer. Theodore Kerr is responsible for ensuring that Scott Wilbur Lucas adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Theodore Kerr is (724) 933-8388.

## Item 7: Requirements For State Registered Advisers

*This disclosure is required by state securities authorities and is provided for your use in evaluating this investment advisor representative's suitability.*

- A. Scott Wilbur Lucas has NOT been involved in any of the events listed below.
1. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
  2. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
    - a) an investment or an investment-related business or activity;
    - b) fraud, false statement(s), or omissions;
    - c) theft, embezzlement, or other wrongful taking of property;
    - d) bribery, forgery, counterfeiting, or extortion; or
    - e) dishonest, unfair, or unethical practices.
- B. Scott Wilbur Lucas has NOT been the subject of a bankruptcy petition in the past ten years.