

**Form ADV Part 2B: Brochure
Supplement
March 2024**

Bradley R. Lancaster



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Chief Compliance Officer

Firm's Website:
www.GoldmanLancaster.com

This brochure supplement provides information about Bradley Lancaster that supplements our brochure. You should have received a copy of that brochure. Please contact Mr. Glenn Goldman if you did not receive Goldman Lancaster, Inc's brochure or if you have any questions about the contents of this supplement.

Additional information about Bradley Lancaster is available on the SEC's website at www.adviserinfo.sec.gov.

Item 2: Educational Background & Business Experience

Bradley R. Lancaster

Year of Birth: 1953

Educational Background:

- 1975: California State University, Long Beach; Bachelor of Arts in Economics
- 1979: California State University, Long Beach; Master of Arts in Economics

Business Background:

- 06/1997 – Present LPL Financial, LLC; Registered Representative
- 02/1994 – Present Goldman Lancaster, Inc; Principal & Investment Advisor

Exams, Licenses & Other Professional Designations:

- 1987: Series 6 Exam
- 1994: Series 2 Exam
- 1996: Series 63 Exam
- 1998: Series 7 Exam
- 2004: Series 24 Exam
- 1992: CERTIFIED FINANCIAL PLANNER™ (CFP®)

CERTIFIED FINANCIAL PLANNER (CFP®)

The CERTIFIED FINANCIAL PLANNER™, CFP® and federally registered CFP® marks are professional certification marks granted in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board").

The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and a number of other countries for its high standard of professional education, stringent code of conduct and standards of practice and ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements: Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services, and attain a Bachelor's Degree from a regionally accredited United States college or university (or its equivalent from a foreign university, pass the comprehensive CFP® Certification Examination, Complete at least three years of full-time financial planning-related experience and agree to be bound by CFP Board's *Standards of Professional Conduct*.

Individuals who become certified must complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial industry and renew an agreement to be bound by the *Standards of Professional Conduct*. The Standards prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

Item 3: Disciplinary Information

We have nothing to disclose in this regard.

Item 4: Other Business Activities

Mr. Lancaster is a registered representative of LPL Financial, LLC, member FINRA/SIPC. He may offer securities and receive commissions as a result of securities transactions. In addition, Mr. Lancaster is a licensed insurance agent. He may offer insurance products and receive normal and customary fees as a result of insurance sales.

The sale of securities and insurance products, and the receipt by Mr. Lancaster of commissions from such sales creates a conflict of interest and an incentive to recommend products based on the compensation Mr. Lancaster may earn rather than the needs of the client. We address this potential conflict of interest by providing disclosure regarding these potential conflicts.

Item 5: Additional Compensation

Mr. Lancaster does not receive any Additional Compensation, outside of his salary and commissions from Goldman Lancaster, Inc.

Item 6: Supervision

Mr. Lancaster's activities are supervised by Glenn Goldman, Chief Compliance Officer of Goldman Lancaster, Inc. pursuant to our firm's Code of Ethics. Please contact Mr. Goldman if you have any questions about Mr. Lancaster's brochure supplement at 562-432-0234.