



Investment Adviser Representative

Jeremy S. Clark, AIF®, C(k)P
Beacon Financial Advisory
LLC

25825 Science Park Dr.
Suite 110
Cleveland, OH 44122
Phone: (216) 910-1850

01/30/2019

This brochure supplement provides information about Jeremy S. Clark, AIF®, C(k)P an investment adviser representative herein referred to as “Your Adviser” that supplements the Investment Advisory Disclosure Brochures (Form ADV 2A) which you should have already received.

Please contact Beacon Financial Advisory LLC at 216-910-1850, if you did not receive the Investment Advisory Disclosure Brochures for the above listed registered investment adviser or if you have any questions about the contents of this supplement.

Additional information about Jeremy S. Clark, AIF®, C(k)P is available via the U.S. Securities and Exchange Commission's website at www.adviserinfo.sec.gov.

EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

Jeremy S. Clark, AIF®, C(k)P

Year of Birth: 1971

Education

The University of North Carolina – Greensboro, B.A., Accounting, 1994

Business Experience

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

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

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

Financial Adviser, Capital Analysts, Incorporated, April 2010 – June 2012

Registered Representative, SMH Capital, Inc., September 2009 – April 2010

Office Manager, The James B. Osworld Company, August 1994 – August 2009

Professional Licenses/Designations

Jeremy S. Clark, AIF®, C(k)P holds the following industry exams or equivalency and Professional Designations.

Series 7 - General Securities Representative Examination

Series 63 - Uniform Securities Agent State Law Examination

Accredited Investment Fiduciary AIF®

Designation Status: Currently offered and recognized by the issuing organization.

Issuing Organization: Center for Fiduciary Studies

Education Requirements: Candidates must accrue six hours of continuing professional education with at least four coming from fi360-produced sources; attest to a code of ethics; maintain current contact information in fi360's designee database; and remit \$325 in annual dues.

Exam Type: Final Exam

Continuing Education Requirements: AIF designees must obtain six combined hours of continuing professional education each renewal year from the sources listed below (at least four hours must be accumulated from the listed fi360-produced sources): The fi360 annual conference (live event); Archived recordings from past fi360 conferences (from the on-demand fi360 CE directory) fi360 Resources webinars (live); Archived recordings of Resources webinars (from the on-demand fi360 CE directory); Relevant events produced by sources outside of fi360 (max of two hours per year allowed); Web-based AIF Training (course audit); Participation in a CEFEX Certification team or as a liaison officer at a firm being Certified (max of 3 hours/year).

Accreditation: Center for Fiduciary Excellence (CEFEX)

Certified 401(k) Professional C(k)P

Designation Status: Currently offered and recognized by the issuing organization

Issuing Organization: The Retirement Adviser University in collaboration with UCLA Anderson School of Management Executive Education to financial professionals.

Prerequisites: Candidates must meet all of the following requirements: 3 years experience in financial services; 10 defined contribution plans under management; and \$30 million in assets under management.

Education Requirements: Complete a rigorous curriculum of more than 50 courses, pass a proctored examination, write a case study detailing real examples of how they are utilizing knowledge from these courses, and attend an intensive three-day classroom training in Los Angeles.

Exam Type: Final exam

Accreditation: Western Association of Schools & Colleges (WASC)

DISCIPLINARY INFORMATION

Jeremy S. Clark, AIF®, C(k)P has no material legal or disciplinary events to report.

OTHER BUSINESS ACTIVITIES

In addition to being an investment adviser representative of one or more affiliated registered investment advisers of The Lincoln Investment Companies, your adviser is also engaged in the following other businesses.

Registered Representative- Lincoln Investment

Jeremy S. Clark, AIF®, C(k)P is a registered representative of Lincoln Investment, a registered broker-dealer. Your adviser may offer the broker-dealer services of Lincoln Investment in addition to advisory services when making financial recommendations to you. If you purchase commissionable products through your adviser, your adviser will receive a commission, and in the case of mutual funds, possibly a 12b-1 fee. You are under no obligation to purchase commissionable securities products through Jeremy S. Clark, AIF®, C(k)P.

Capital Analyst Inc - Investment Adviser Representative - Mr. Clark is an investment Adviser representative with Capital Analyst Inc.

Capital Analysts and Lincoln Investment provide incentives, such as sales conferences, for financial advisers, the eligibility for which may be based on the number of advisory accounts or the total assets under management. This may present a potential conflict of interest. Capital Analysts and Lincoln Investment hold their Financial Advisers to a Code of Ethics and owe a fiduciary duty to all clients. Both firms require your Financial Adviser to place your interests above his or her own at all times and to avoid any recommendation that would not be in your best interest. It is each financial adviser's responsibility to understand and adhere to the requirements of the Code of Ethics, as well as applicable laws, regulations, and rules

Independent Insurance Agent

Jeremy S. Clark, AIF®, C(k)P is licensed through Lincoln Investment or an independent agency to solicit, offer and sell insurance products. Your adviser may be appointed with various insurance companies. Jeremy S. Clark, AIF®, C(k)P may receive separate, yet customary commission and other financial incentive compensation resulting from the purchases and sales of insurance products. You are under no obligation to purchase insurance products through Jeremy S. Clark, AIF®, C(k)P.

Beacon Financial Partners

In addition to these activities, Mr. Clark is a Director of Retirement Plan Services at Beacon Financial Partners, which specializes in the sales and service of qualified retirement plans. This activity provides a substantial source of Mr. Clark's income and involves a substantial amount of Mr. Clark's time.

Best Day of the Year Foundation – Serves as Treasurer of non-profit organization

St. Martin's Episcopal Church – Serves as Senior Warden, responsible for oversight of Church property.

401(k) Tech Advisers – DBA – from time to time, Mr. Clark may market under the DBA of 401(k) Tech Adviser. He may offer clients advice or products from those activities and clients should be aware that these services may involve a conflict of interest. Beacon Financial Advisory LLC always acts in the best interest of the client and clients are in no way required to the services of any representative of Beacon Financial Advisory LLC in connection with such individual's activities outside of Beacon Financial Advisory LLC.

No client is under any obligation to purchase any non-investment related activities from this adviser. The above firms are independent and non-affiliated with the RIA.

ADDITIONAL COMPENSATION

Your adviser's involvement in other business activities as described above defines additional activities for which your adviser could recommend other products or services to you. This creates a potential conflict of interest for your adviser to promote these products or services in addition to the advisory services.

The registered investment adviser holds your adviser to a Code of Ethics and a fiduciary duty to advisory clients. The registered investment adviser requires your adviser to place your interests above their own at all times and to avoid any recommendation that would not be in your best interest. It is each adviser's responsibility to understand and adhere to the requirements of the Code of Ethics, as well as applicable laws, regulations, and rules.

Perceived or actual conflicts of interest that may arise in relation to advisory services are governed by your adviser's professional and legal duties as a fiduciary, and by the registered investment adviser's policies and procedures designed to mitigate and disclose the existence of such conflicts.

Please refer to the Fees and Compensation section in the registered investment adviser's Investment Advisory Disclosure Brochure (Form ADV 2A), which should have been provided to you by your Financial Adviser. The Fees and Compensation section describes in detail the potential other forms of compensation received by your adviser such as brokerage or insurance commissions, due diligence seminars, sales incentives, loans, or advances.

SUPERVISION

Your adviser is assigned to a Designated Supervisor that is responsible for supervising your adviser's investment advisory activities.

Supervisor Name: Deborah L. George

Title: Chief Compliance Officer

Phone Number: (216) 910-1865

The Designated Supervisor or his or her designee will periodically review the investment advisory activities, client communications, and your adviser's adherence to the registered investment adviser's Code of Ethics. In addition, the Designated Supervisor will monitor the advice being provided to ensure that your adviser is providing the services for which the adviser was engaged.