User Guidance

www.adviserinfo.sec.gov

IAPD Report

JONATHAN HARE WILT

CRD# 1399796

When communicating online or investing with any professional, make sure you know who you're dealing with. Imposters might link to sites like BrokerCheck from phishing or similar scam websites, or through social media, trying to steal your personal information or your money.

Please contact FINRA with any concerns.

IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page http://www.nasaa.org/IAPD/IARReports.cfm

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association http://www.nasaa.org

Report Summary

JONATHAN HARE WILT (CRD# 1399796)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **03/17/2026**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
B	LINCOLN INVESTMENT	CRD# 519	08/20/1985
IA	LINCOLN INVESTMENT	CRD# 519	08/01/2002
IA	CAPITAL ANALYSTS	CRD# 162200	04/29/2014

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **22** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration.
Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

FIRM	CRD#	LOCATION	REGISTRATION DATES

No information reported.

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative? **Yes**

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	3

Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works.
This individual is currently registered with **22** jurisdiction(s) and 1 SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **LINCOLN INVESTMENT**

Main Address: 601 OFFICE CENTER DRIVE
SUITE 300
FORT WASHINGTON, PA 19034-3232

Firm ID#: 519

	Regulator	Registration	Status	Date
B	FINRA	Invest. Co and Variable Contracts	Approved	08/20/1985
B	FINRA	General Securities Representative	Approved	08/21/1986
B	FINRA	General Securities Principal	Approved	09/09/1987
B	Arizona	Agent	Approved	09/21/2000
B	Arkansas	Agent	Approved	01/03/2019
B	California	Agent	Approved	12/21/1994
B	Delaware	Agent	Approved	08/31/1994
B	District of Columbia	Agent	Approved	09/05/2014
B	Florida	Agent	Approved	11/23/1993
B	Illinois	Agent	Approved	01/03/2019
B	Maine	Agent	Approved	11/16/2011
B	Maryland	Agent	Approved	03/15/1999
B	Massachusetts	Agent	Approved	02/11/2010

Qualifications

	Regulator	Registration	Status	Date
B	Michigan	Agent	Approved	07/17/2000
B	Nevada	Agent	Approved	05/03/2019
B	New Jersey	Agent	Approved	08/23/1985
IA	New Jersey	Investment Adviser Representative	Approved	08/01/2002
B	New Mexico	Agent	Approved	10/28/2004
B	New York	Agent	Approved	07/10/2000
B	North Carolina	Agent	Approved	09/22/2000
B	Ohio	Agent	Approved	08/19/2010
B	Pennsylvania	Agent	Approved	08/21/1985
B	South Carolina	Agent	Approved	09/19/2000
B	Tennessee	Agent	Approved	01/25/2022
B	Texas	Agent	Approved	01/10/2020
B	Virginia	Agent	Approved	03/07/1994

Branch Office Locations

LINCOLN INVESTMENT
SUITE 10201
10000 SAGEMORE DRIVE
MARLTON, NJ 08053

LINCOLN INVESTMENT
1725 The Fairway
Jenkintown, PA 19046

Employment 2 of 2

Firm Name: **CAPITAL ANALYSTS**

Main Address: 601 OFFICE CENTER DRIVE
SUITE 300
FORT WASHINGTON, PA 19034-3232

Firm ID#: 162200

Qualifications

	Regulator	Registration	Status	Date
IA	New Jersey	Investment Adviser Representative	Approved	04/29/2014

Branch Office Locations

CAPITAL ANALYSTS
8000 SAGEMORE DRIVE
SUITE 8301
MARLTON, NJ 08053

Qualifications

PASSED INDUSTRY EXAMS

This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 1 principal/supervisory exam, 3 general industry/product exams, and 2 state securities law exams.

Principal/Supervisory Exams

	Exam	Category	Date
B	General Securities Principal Examination (S24)	Series 24	09/02/1987

General Industry/Product Exams

	Exam	Category	Date
B	Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
B	General Securities Representative Examination (S7)	Series 7	08/16/1986
B	Investment Company Products/Variable Contracts Representative Examination (S6)	Series 6	08/16/1985

State Securities Law Exams

	Exam	Category	Date
IA	Uniform Investment Adviser Law Examination (S65)	Series 65	01/12/1996
B	Uniform Securities Agent State Law Examination (S63)	Series 63	08/16/1985

PROFESSIONAL DESIGNATIONS

This section details that the representative has reported **1** professional designation(s).

Certified Financial Planner

Only professional designations listed in Question 8 of the Form U4 will appear in this section if the appropriate box is checked and verified by the issuing organization at the time of the filing. Learn more about eligible designations at IARD and NASAA.

Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

No information reported.

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
10/2014 - Present	PULLEY AND BUTTONHOLE THEATRE COMPANY	A MEMBER OF THE BOARD OF DIRECTORS	N	JENKINTOWN, PA, United States
07/1985 - Present	LINCOLN INVESTMENT PLANNING, INC.	NOT PROVIDED	Y	VOORHEES, NJ, United States

OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

HIWAY THEATER
POSITION: PRESIDENT OF THE BOARD OF DIRECTORS NATURE: NON PROFIT INVESTMENT RELATED: NO NUMBER OF HOURS: 4 INVESTMENT RELATED HOURS: 0 START DATE: 07/01/2012
ADDRESS: OLD YORK ROAD, JENKINTOWN PA 19046
DESCRIPTION: OVERSIGHT OF THE OPERATIONS OF THE HIWAY THEATER MANAGEMENTIMPLIMINTATION OF THE HIWAY STATEGIC PLANS

HERITAGE ADVISORY GROUP
POSITION: President NATURE: Financial Planning INVESTMENT RELATED: Yes NUMBER OF HOURS: 300 SECURITIES TRADING HOURS: 200 START DATE: 01/01/2019
ADDRESS: 515 Cloverly Ave, Jenkintown PA 19046, United States
DESCRIPTION: Running a financial planning practice

HUNTINGDON VALLEY COUNTRY CLUB
POSITION: Member board of directors, Head of rackets committee NATURE: Social and athletic club INVESTMENT RELATED: No NUMBER OF HOURS: 4 SECURITIES TRADING HOURS: 0 START DATE: 05/01/2019
ADDRESS: 2295 Country Club Drive, Huntingdon Valley PA 19006, United States
DESCRIPTION: Preparing budgets and maintaining supervision with a full time paid treasurer preparing annual schedule with a committee of five and maintaining supervision with a full time paid racket professional

1725 THE FAIRWAY INVESTMENTS
POSITION: member NATURE: commercial real estate INVESTMENT RELATED: Yes NUMBER OF HOURS: 1 SECURITIES TRADING HOURS: 0 START DATE: 05/01/2021
ADDRESS: 1725 Fairway Road, Jenkintown PA 19046, United States
DESCRIPTION: assist Richard Gaglianese in the building management which is a minimal amount of time or effort

Registration & Employment History

OTHER BUSINESS ACTIVITIES

RENEW THEATRES
POSITION: Member of Board of Directors NATURE: Operation of County Theatres INVESTMENT RELATED: No NUMBER OF HOURS: 1 SECURITIES TRADING HOURS: 1 START DATE: 01/01/2018
ADDRESS: 91 E Court St, Doylestown PA 18901, United States
DESCRIPTION: Member of Board of Directors which encompasses 2 30 minute phone meetings per year.

Edgelight Investments Management, LLC
Position: Minority owner Nature: sub-advisor entity Investment Related: Yes Hours: 1 Securities Trading Hours: 1 Start Date: 3/1/2026 Address: 1725 The Fairway Jenkintown, PA 19046 Description: review of monthly expenses of the operation only

Disclosure Summary

Disclosure Information

What you should know about reported disclosure events:

(1) Certain thresholds must be met before an event is reported to IARD, for example:

- A law enforcement agency must file formal charges before an Investment Adviser Representative is required to report a particular criminal event.;
- A customer dispute must involve allegations that an Investment Adviser Representative engaged in activity that violates certain rules or conduct governing the industry and that the activity resulted in damages of at least $5,000.

(2) Disclosure events in IAPD reports come from different sources:

As mentioned in the "About IAPD" section on page 1 of this report, information contained in IAPD comes from Investment Adviser Representatives, firms and regulators. When more than one of these sources reports information for the same disclosure event, all versions of the event will appear in the IAPD report. The different versions will be separated by a solid line with the reporting source labeled.

(3) There are different statuses and dispositions for disclosure events:

- A disclosure event may have a status of *pending, on appeal,* or *final*.
    - A "pending" disclosure event involves allegations that have not been proven or formally adjudicated.
    - A disclosure event that is "on appeal" involves allegations that have been adjudicated but are currently being appealed.
    - A "final" disclosure event has been concluded and its resolution is not subject to change.
- A final disclosure event generally has a disposition of *adjudicated, settled* or *otherwise resolved*.
    - An "adjudicated" matter includes a disposition by (1) a court of law in a criminal or civil matter, or (2) an administrative panel in an action brought by a regulator that is contested by the party charged with some alleged wrongdoing.
    - A "settled" matter generally represents a disposition wherein the parties involved in a dispute reach an agreement to resolve the matter. Please note that Investment Adviser Representatives and firms may choose to settle customer disputes or regulatory matters for business or other reasons.
    - A "resolved" matter usually includes a disposition wherein no payment is made to the customer or there is no finding of wrongdoing on the part of the Investment Adviser Representative. Such matters generally involve customer disputes.

(4) You may wish to contact the Investment Adviser Representatives to obtain further information regarding any of the disclosure events contained in this IAPD report.

DISCLOSURE EVENT DETAILS

When evaluating this information, please keep in mind that some items may involve pending actions or allegations that may be contested and have not been resolved or proven. The event may, in the end, be withdrawn, dismissed, resolved in favor of the Investment Adviser Representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

This report provides the information exactly as it was reported to the Investment Adviser Registration Depository. Some of the specific data fields contained in the report may be blank if the information was not provided.

The following types of events are disclosed about this representative:

Type	Count
Customer Dispute	3

Customer Dispute

This section provides information regarding a customer dispute that was reported to the Investment Adviser Registration Depository (IARD) by the Investment Adviser Representative (IAR), an investment adviser and/or securities firm, and/or a securities regulator. The event may include a consumer-initiated, investment-related complaint, arbitration proceeding or civil suit that contains allegations of sales practice violations against the individual.

The customer dispute may be pending or may have resulted in a civil judgment, arbitration award, monetary settlement, closure without action, withdrawal, dismissal, denial, or other outcome.

Disclosure 1 of 3

Reporting Source:	Individual
Employing firm when activities occurred which led to the complaint:	LINCOLN INVESTMENT PLANNING, INC.
Allegations:	CLIENT ALLEGES REPRESENTATIVE DIDN'T FOLLOW INSTRUCTIONS CAUSING CLIENT TO LOSE $10,000.
Product Type:	Mutual Fund
Alleged Damages:	$10,000.00
Is this an oral complaint?	No
Is this a written complaint?	Yes
Is this an arbitration/CFTC reparation or civil litigation?	No

Customer Complaint Information

Date Complaint Received:	05/20/2009
Complaint Pending?	No
Status:	Settled
Status Date:	09/24/2009
Settlement Amount:	$5,400.00
Individual Contribution Amount:	$2,700.00

Disclosure 2 of 3

Reporting Source:	Individual
Employing firm when activities occurred which led to the complaint:	LINCOLN INVESTMENT PLANNING, INC.
Allegations:	FORMER CLIENT ALLEGED THAT REPRESENTATIVE IGNORED HER REQUESTS TO MOVE INTO MORE CONSERVATIVE INVESTMENT AS SHE WAS APPROACHING RETIREMENT, CAUSING HER TO LOSE MONEY IN THE MARKET.
Product Type:	Mutual Fund(s)
Alleged Damages:	$15,000.00

Customer Complaint Information

Date Complaint Received:	01/17/2003
Complaint Pending?	No
Status:	Denied
Status Date:	02/10/2003
Settlement Amount:	
Individual Contribution Amount:	

Disclosure 3 of 3

Reporting Source:	Individual
Employing firm when activities occurred which led to the complaint:	LINCOLN INVESTMENT PLANNING, INC.
Allegations:	ACCORDING TO THE CLIENT, ON 4 OCCASIONS THE CLIENT'S MONIES "WERE STOLEN WITHOUT AUTHORIZATION" FROM HER ACCOUNT. THE CLIENT ALLEGES INVOLVEMENT IN "UNAUTHORIZED" TRANSACTIONS TOTALING $14,750 WHICH OCCURRED DURING THE PERIOD 10/02/97 TO 11/09/98 FROM HER AIM WEINGARTEN 403(B) ACCOUNT. SUCH "UNAUTHORIZED" WITHDRAWALS RELATE TO 4 SIGNED DISTRIBUTION REQUESTS PROCESSED BY LINCOLN ON HER BEHALF. HER LETTER REQUESTED FULL REIMBURSEMENT OF DISTRIBUTED FUNDS, PLUS INTEREST. THROUGHOUT THE PERIOD OF TIME RELATING TO THE ALLEGED INCIDENCES, JONATHAN WILT WAS A FINANCAIL REPRESENTATIVE AT LINCOLN INVESTMENT PLANNING, INC.
Product Type:	Other
Other Product Type(s):	AIM 403(B) ACCOUNT
Alleged Damages:	$14,750.00

Customer Complaint Information

Date Complaint Received:	04/16/1999
Complaint Pending?	No

Status:	Denied
Status Date:	04/28/1999
Settlement Amount:	
Individual Contribution Amount:	
Broker Statement	ON 04/28/99, THE CLIENT WAS SENT A RESPONSE DENYING ANY WRONGDOING BY LINCOLN OR ITS FINANCIAL REPRESENTATIVES. COPIES OF HER SIGNED AUTHORIZATIONS REQUESTING THESE WITHDRAWALS AND COPIES OF THE AIM CANCELED CHECKS FOR THE 4 DISTRIBUTIONS IN QUESTION, WHICH HAD BEEN SENT DIRECT BY AIM TO THE CLIENT'S ADDRESS OF RECORD, WERE ALSO SUPPLIED. SUCH CANCELLED CHECKS REFLECT ENDORSEMENTS ON SUCH CHECKS WITH THE CLIENT'S PERSONAL CHECKING ACCOUNT NUMBER WRITTEN UNDER THE ENDORSEMENT. LINCOLN AND MR. WILT DENY THE ALLEGATIONS. THE CLIENT WAS INFORMED THAT CONTROLS WERE FOLLOWED; SIGNED REQUEST FORMS WERE REQUIRED, ALL DISBURSEMENTS AND CONFIRMATION OF THE DISBURSEMENTS, AS WELL AS QUARTERLY STATEMENTS REFLECTING THESE DISBURSEMENTS, WERE SENT TO THE CLIENT'S ADDRESS OF RECORD. THIS CLIENT'S SPOUSE CALLED OR STOPPED BY THE OFFICE ON THE FOUR OCCASIONS AND REQUESTED DISTRIBUTION FORMS ON HIS WIFE'S BEHALF. SUCH DISTRIBUTION REQUEST FORMS WERE EITHER GIVEN TO THE SPOUSE OR MAILED BY LINCOLN TO THE CLIENT AT THE CLIENT'S ADDRESS OF RECORD. THE FORMS WERE ALWAYS RETURNED SIGNED BY THE CLIENT. LINCOLN'S AND MR. WILT'S INVOLVEMENT WERE LIMITED TO PROVIDING THE FORM AND PROCESSING THE WITHDRAWAL REQUESTS TO AIM. ALL WITHDRAWN FUNDS WERE PAYABLE BY AIM TO THE CLIENT AND SENT BY AIM TO THE CLIENT'S ADDRESS OF RECORD.

End of Report

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