National Planning Team

Lincoln Financial Network's National Planning Team brings some of our organization's most knowledgeable and talented individuals together to support our national network of financial professionals. This team is highly respected throughout our industry for their thought leadership, experience, reputation, and results.

With an average of more than 24 years of service, our National Planning Team helps our financial professionals provide world-class financial planning to individuals, families, and business owners across America.

Ben T. Huddle, MBA, CFP®, CRPC®

Director of Financial Advisory Services

- **Areas of expertise:** Development, training, and implementation of fee-based financial planning. Integration of the investment and comprehensive financial planning processes.
- **Education:** Master's degree in Business Administration from University of Houston; Bachelor's degree in Industrial Management from Purdue University.
- **Professional designations:** CFP®, CRPC®
- **Years of service:** 24

Mary Young

Director of Financial Advisory Services

- **Areas of expertise:** Estate distribution strategies for high net worth families, senior executive compensation, tax return analysis, and retirement planning.
- **Education:** Bachelor's degree from University of Connecticut with concentrations in Finance and Accounting.
- **Years of service:** 32

Jane Johnson, CFP®

Director of Financial Advisory Services

- **Areas of expertise:** Estate, retirement, investment, and business succession plans.
- **Education:** Bachelor's degree from the College of William and Mary.
- **Professional designations:** CFP®
- **Years of service:** 28

Timothy S. Johnson, JD*, CRPC®

Chief Investment Strategist

- **Areas of expertise:** Fixed-income, equity allocations, alternative investments, and affluent wealth management.
- **Education:** Juris Doctor degree from Vanderbilt University School of Law; Bachelor's degree in Political Science from Lipscomb University.
- **Professional designations:** CRPC®, Series 7 FINRA registration.
- **Years of service:** 19

Dianna Parker, CFP®

Director of Planning

- **Areas of expertise:** Complex estate planning, business succession planning, and retirement planning.
- **Education:** Master's degree from Southern Methodist University.
- **Professional designations:** CFP®
- **Years of service:** 30

Russell G. Jones

Executive Director, Sagemark Consulting Private Wealth Services**

- **Areas of expertise:** Key concepts and strategies for the high net worth market.
- **Education:** Bachelor's degree from St. Lawrence University.
- **Years of service:** 40

Christopher Fromm, ChFC®, CFP®, CBEC®

Director of Planning

- **Areas of expertise:** Comprehensive financial planning for the high net worth market.
- **Education:** Bachelor's degree in Business Administration from University of North Florida.
- **Professional designations:** ChFC®, CFP®, CBEC®, Series 6, 7, and 66 FINRA registrations.
- **Years of service:** 19

Aaron Huntoon, MBA, CRPC®, CBEC®

Director of Planning

- **Areas of expertise:** Comprehensive financial planning for the high net worth market.
- **Education:** Master's degree in Business Administration from Regis University; Bachelor's degree in Marketing, International Business, and Spanish from Miami University.
- **Professional designations:** CRPC®, CBEC®
- **Years of service:** 17

Julia Santullano, JD*

Director of Planning

- **Areas of expertise:** Multiple strategies for wealth transfer that meets objectives while reducing taxes for the high net worth market and business owners.
- **Education:** Juris Doctor degree from Northwestern University School of Law.
- **Years of service:** 1

Fred Fedorowich, CFP®, CRPC®

Director of Planning

- **Areas of expertise:** Comprehensive and dynamic financial planning for the high net worth market.
- **Education:** Bachelor's degree in Business Administration with a minor in Psychology from University of North Florida.
- **Professional designations:** CFP®, CRPC®, Series 6, 7, and 65 FINRA registrations.
- **Years of service:** 18

Donna Rowan, JD*, LL.M, CLU®, ChFC®

Assistant Vice President, National Design

- **Areas of expertise:** Advanced planning case design support, field training, legislative monitoring and reporting, and compliance-related business and technical review of sales and marketing materials.
- **Education:** Juris Doctor degree from Western New England University School of Law; Master of Laws degree in Taxation from Boston University School of Law; Bachelor's degree from State University of New York at Buffalo.
- **Professional designations:** CLU®, ChFC®
- **Years of service:** 29

Robert Appel, JD*, LL.M, MBA

Vice President, National Design

- **Areas of expertise:** Advanced planning case design support, field training, legislative monitoring and reporting, compliance-related business and technical review of sales and marketing materials.
- **Education:** Juris Doctor degree from University of Bridgeport School of Law; Master of Laws degree in Taxation from Boston University School of Law; Master's degree in Business Administration with a concentration in Finance from University of Connecticut; Bachelor's degree in Accounting and Finance from Central Connecticut State University.
- **Years of service:** 34

LincolnFinancial.com

Lincoln Financial Network is the marketing name for the retail and financial planning affiliates of Lincoln Financial Group and includes Lincoln Financial Securities Corporation and Lincoln Financial Advisors, broker/dealers, registered investment advisors and members of FINRA and SIPC. Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates. Insurance offered through Lincoln affiliates and other fine companies.and contractual obligations.

CRN-3112871-060320

PDF 06/20

*CPAs and JDs with the firm do not provide legal or accounting services on behalf of Lincoln Financial Advisors Corp.

**A member group within Lincoln Financial Advisors Corp. which focuses on clients in the high-net worth market. Securities and investment advisory services offered through Lincoln Financial Advisors Corp., a broker-dealer (member SIPC) and registered investment advisor. Insurance offered through Lincoln affiliates and other fine companies. Lincoln Financial Group is the marketing name for Lincoln National Corporation and its affiliates.