



Financial Professional

William P. Matejka, AAMS®
FNA Wealth Management,
Ltd. 2214 Enterprise Parkway
East Twinsburg, OH 44087
Phone: (330) 425-8139

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Associated with the following affiliated Registered Investment Advisers:

Principal Office:
Beacon Financial Advisory LLC
25825 Science Park Drive
#110
Cleveland, OH 44122

This brochure supplement provides information about William Matejka, an investment adviser representative herein referred to as "Your Adviser" that supplements the Form ADV2A which you should have already received. This brochure provides information about William P. Matejka, who is dually licensed to offer broker dealer and investment advisory services.

Additional information about William P. Matejka, is available via FINRA's BrokerCheck website at www.finra.org or the U.S. Securities and Exchange Commission's website at www.adviserinfo.sec.gov.

EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

William P. Matejka, AAMS®

Year of Birth: 1970

Education

John Carroll University, B.S., Economics, 1996

Business Experience

William P. Matejka is dually registered as an Investment Adviser Representative and Registered Representative of a Broker-Dealer and one or more Registered Investment Advisers.

Investment Adviser Representative, Lincoln Investment Planning, LLC, August 2016 – Present

Registered Representative, Lincoln Investment Planning, LLC, August 2016 – Present

Registered Representative, Sterne Agee Financial Services, Inc., September 2014 – August 2016

Registered Representative, WRP Investments, Inc., March 2010 – September 2014

Professional Licenses/Designations

William P. Matejka holds the following industry exams or equivalency and Professional Designations.

Series 6 - Investment Company and Variable Contracts Products Representative Examination

Series 7 - General Securities Representative Examination

Series 63 - Uniform Securities Agent State Law Examination

Accredited Asset Management Specialist AAMS®

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

Issuing Organization: College for Financial Planning.

Prerequisites: None.

Education Requirements: Self-study course (12 modules requiring 100-120 hrs.).

Examination Type: Final designation exam (online, closed-book, proctored).

Continuing Education Requirements: 16 hours every 2 years.

Accreditation: North Central Association (NCA); Higher Learning Commission (HLC).

DISCIPLINARY INFORMATION

William P. Matejka has no material legal or disciplinary events to report.

OTHER BUSINESS ACTIVITIES

Lincoln Investment Registered Representative - Mr. Matjeka 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 Mr. Matjeka.

Investment Adviser Representative –Mr. Matejka is an investment Adviser representative with Lincoln Investment.

Lincoln Investment provides 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. 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 -Mr. Matejka 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. Mr. Matejka 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 Mr. Matejka. All individuals that act as either broker dealer agents and/or investment advisor representatives are also licensed to offer insurance products to our clients. This may include traditional life insurance, annuities (fixed and equity indexed) and other insurance products that a client may have a need for. In this role, they will earn a commission on the sale of these products. This represents a potential conflict of interest which needs to be disclosed to our clients.

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.

SUPERVISION

William P. Matejka is assigned to a Designated Supervisor. The Designated Supervisor, or his or her designee, will review and monitor the advice and recommendations of your Financial Professional, their client communications, and your Financial Professional’s adherence to the firms’ Code of Ethics, policies and procedures to ensure that all advice and recommendations are in the client’s best interest.

Supervisor Name: Deborah L. George

Title: Chief Compliance Officer

Phone Number: (216) 910-1865