Investment Management & Research Team

Meet the talented professionals behind your managed account programs

- Seasoned research staff with industry credentials and decades of experience
- Established track record using disciplined approach to asset management
- Leading-edge strategies using a combination of active and passive approaches
- Focused risk management employing multiple asset classes and styles for maximum diversification
- Over $10.6 billion under management*

** All information as of 5/31/2016 for Lincoln Investment and Capital Analysts discretionary managed accounts.*

Steve Mayhew, CFA®, CPA, CFP®

Senior Vice President and Chief Investment Officer
29 years industry experience

Steve Mayhew served as senior vice president for Capital Analysts before joining Lincoln Investment; he headed their investment management and research activities and was instrumental in setting their asset allocation strategy. In 1986 he developed a proprietary strategic analysis program which rates mutual funds on consistency, risk, market cycle and long-term performance. This program has been used continuously since its inception.

After completing undergraduate work at Penn State, Steve earned an MBA degree from Drexel University and he is a graduate of the Securities Industry Institute Program at the Wharton School of the University of Pennsylvania. He is former chairman of the Financial Products Advisory Council of the Financial Planning Association (FPA) and currently serves as an arbitrator for FINRA.

Chris Surrichio, CFA®

Vice President and Portfolio Manager
21 years industry experience

Chris served as director of research with Capital Analysts for ten years prior to joining Lincoln Investment in 2012. He now works as manager of the CAAMS portfolios and helps oversee the day-to-day functions of the investment management team with Lincoln Investment. His extensive professional experience is a valuable resource to financial advisors crafting portfolios for high net worth clients and writing proposals for institutions.

Chris earned a degree in economics from Boston College and has worked with Vanguard and Rightime Funds.

Jerry Burhop, CFA®, CIPM®

Vice President and Portfolio Manager
21 years industry experience

Jerry joined Lincoln Investment in 1999 as a mutual fund analyst. Currently, as Vice President and Portfolio Manager, Jerry is responsible for the development and management of the Progressive portfolios, management of the Lincoln Strategic and Strategic Plus portfolios and monitoring of the third-party strategists on the **SOLUTIONS** platform. He is also involved in the management of all Investment Management & Research managed portfolios.

Before coming to Lincoln, Jerry worked with Vanguard on their international funds and retirement plans. He earned a BS degree from the University of Wisconsin and an MBA degree from Temple University.

Brian Moran

Director of Trading, Fixed Income Portfolio Manager
24 years industry experience

Before joining Lincoln Investment as Institutional Trading Manager in 2012, Brian was with Capital Analysts for more than a decade. Initially he managed brokerage operations and trading, transitioning to Institutional Trading Manager, as the Capital Analysts Asset Management Services (CAAMS) grew. Currently, Brian serves as Director of Trading for both brokerage and institutional trading, and as Fixed Income Portfolio Manager for CAAMS Income Strategies.

His professional experience includes time as a senior trader with WR Hambrecht & Co. and as a branch manager for TD Waterhouse. He graduated from the Wharton School of the University of Pennsylvania with a Bachelor of Science degree in economics. He also holds an MBA from Drexel University's Le Bow College of Business.

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Investment Management & Research Team

Ted O'Donoghue

Senior Research Analyst

14 years industry experience

Ted served as an investment analyst with Commonwealth Financial Network in Waltham, Massachusetts, before coming to Lincoln Investment. Among other responsibilities, he provided investment research and portfolio analysis support to the entire field of financial advisors affiliated with Commonwealth Financial.

Ted earned a BA degree in economics from Bucknell University and an MBA in investment management and finance from Penn State University.

He joined Lincoln Investment in 2012 and works as a mutual fund analyst supporting the Progressive Asset Management models, the CAAMS complete models, and the Capital Analysts Performance Statistical Leaders (CAPSL) list.

Alex Penta

Investment Analyst

6 years industry experience

Alex joined Lincoln Investment in 2015 as an institutional trader, helping with the implementation of the Capital Analysts Asset Management Services (CAAMS) program.

Prior to Lincoln, Alex served as a Portfolio Specialist with BlackRock. He assisted portfolio managers in delivering investment solutions across multiple platforms. His work included trading client accounts and handling investment inquiries from Merrill Lynch financial advisors, trust officers, and clients. His career also includes time with First Niagara Financial Group and Pershing LLC.

Alex graduated from Gettysburg College with a Bachelor's degree in Business Management.

Greg Bender

Investment Analyst

6 years industry experience

Greg Bender joined Lincoln Investment in November 2015 as an institutional trader and investment analyst and assists in implementing the Capital Analysts Asset Management Services (CAAMS) program.

Before joining Lincoln, Greg worked with JPMorgan Chase, and with Valley Forge Asset Management. With Valley Forge he served as a trader and investment analyst, providing investment research and portfolio analysis for both the fixed income and equity products.

Greg earned a BS degree in finance from Elotn University.

Steven Mueller

Research Analyst

4 years industry experience

Steve is a recent graduate of Temple University where he earned a bachelor's degree in business administration. While still in college, he served an internship with Lincoln Investment.

Shortly after graduation he was hired as a full-time internal wholesaler with Lincoln's Advisor Consulting & Development team. After a year he was promoted to the position of investment analyst with Investment Management & Research where he assists in analysis of investment products, primarily with illiquid investments and mutual fund research. As a member of the Investments Committee, he assists management with the securities analysis for Lincoln's Capital Analysts Asset Management Services (CAAMS) and **SOLUTIONS** programs.

Casey Eidenshink

Junior Research Analyst

1 year industry experience

While still in college, Casey Eidenshink served an internship with Lincoln Investment. He recently graduated from Lehigh University where he earned a bachelor's degree in finance and has joined Lincoln as a full-time junior research analyst with the Investment Management and Research group.

Casey assists in analysis of investment products, primarily exchanged traded funds and does mutual fund research for Lincoln's Capital Analysts Asset Management Services (CAAMS) and **SOLUTIONS** Programs.

LINCOLN INVESTMENT | Capital Analysts
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