



JONATHAN WICKER

Credential

Lincoln Investment
Sewickley, PA

2024 NTSA
ELITE
ADVISOR
AWARDS



RETIREMENT ASSETS UNDER ADVISEMENT:

\$50,000,000 +

PARTICIPANTS SERVED: 500

SCHOOL DISTRICTS SERVED: 27

Jonathan Wicker has been servicing retirement plans in the education sector for over 16 years. A repeat President Club advisor at Lincoln Investments and a long-standing member of numerous committees, Jonathan has solidified himself as a positive changemaker in the industry and a role model to his peers.

Since the start of his career, Jonathan has taken an active role in his school districts preparing educators to advocate for their retirement. Through collaborating with local teachers' unions and attending state association meetings, Jonathan gets directly involved by educating his clients on changes bound to impact their financial well-being.

"Unfortunately, a negative perception of the 403(b) space has emerged due to a number of people viewing us as just salesmen," Jonathan says. "I am working to change that narrative by first bringing financial education to the districts. That way, we can show people that we not only can help them with their 403(b), but with any other financial concerns they have throughout their lives."

Jonathan hopes that by modeling these values, future advisors will continue to uphold them in the coming years. "I believe there will be nothing worse for our clients than if we ever lose sight of the reason we got into this business," Jonathan states. "By maintaining authenticity in our work and helping mold our training and mentorship programs, we can bring in new advisors that build successful businesses from strong foundations."