

Item 1 Cover Page

A.

Daniel C. Danese

Legacy Solutions, LLC

ADV Part 2B, Brochure Supplement

Dated: March 22, 2024

Contact: Maria Stewart, Chief Compliance Officer

206 North Union Street

Kennett Square, Pennsylvania 19348

B.

This Brochure Supplement provides information about Daniel C. Danese that supplements the Legacy Solutions, LLC Brochure; you should have received a copy of that Brochure. Please contact Maria Stewart, Chief Compliance Officer, if you did *not* receive Legacy Solutions, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Daniel C. Danese is available on the SEC's website at www.adviserinfo.sec.gov

Item 2 Education Background and Business Experience

Daniel C. Danese was born in 1959. Mr. Danese graduated from West Chester University in 1984 with a Bachelor of Science degree in geology. Mr. Danese has been employed as an investment adviser representative of Legacy Solutions, LLC since November of 2022. Mr. Danese has also been a registered representative and investment adviser representative of Lincoln Investment and an investment adviser representative of Capital Analysts, LLC since June of 2012.

Mr. Danese is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Mr. Danese has held the designation of Chartered Life Underwriter (CLU®) since 1998. Since 1927, the CLU® has been the respected risk management credential for advisors. Designees have completed eight or more college-level courses representing an average study time of 400 hours. Topics for required courses include insurance and financial planning, life insurance law, estate planning, and planning for business owners and professionals. Elective courses include such advanced topics as income taxes, group benefits, retirement planning, and health insurance. CLU®

designees must meet experience and continuing education requirements and must adhere to a high ethical standard. The mark is awarded by The American College, a non-profit educator with the top level of academic accreditation.

Mr. Danese has held the designation of Retirement Income Certified Professional® (RICP®) since 2017. The RICP® designation teaches advisers techniques and best practices used to create sustainable streams of retirement income. The education covers retirement income planning, maximizing Social Security and other income sources, minimizing risks to the plan, and managing portfolios during the asset distribution phase. The designation includes three required, college-level courses that represent a total average study time of more than 150 hours. RICP® designees must meet experience, continuing education and ethics requirements. The credential is awarded by The American College, a non-profit educator founded in 1927 and the highest form of academic accreditation.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Registered Representative of Lincoln Investment.** Mr. Danese is a registered representative of Lincoln Investment (“Lincoln”), an SEC Registered and FINRA member broker-dealer. Clients may choose to engage Mr. Danese in his individual capacity as a registered representative of Lincoln, to implement investment recommendations on a commission basis.
1. **Conflict of Interest.** The recommendation by Mr. Danese that a client purchase a securities commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend investment products based on commissions to be received, rather than on a particular client’s need. No client is under any obligation to purchase any commission products from Mr. Danese. Clients are reminded that they may purchase investment products recommended by Mr. Danese through other, non-affiliated broker dealers. **The Registrant’s Chief Compliance Officer, Maria Stewart, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**
 2. **Commissions.** In the event the client chooses to purchase investment products through Lincoln, brokerage commissions will be charged by Lincoln to effect securities transactions, a portion of which commissions shall be paid by Lincoln to Mr. Danese. The brokerage commissions charged by Lincoln may be higher or lower than those charged by other broker-dealers. The securities commission business conducted by Mr. Danese is separate and apart from Registrant’s investment management services discussed in the Registrant’s *Brochure*.

Other Investment Adviser Firm. Mr. Danese also serves as an investment adviser representative of Lincoln, in its capacity as an unaffiliated SEC registered investment advisor firm. Mr. Danese may refer certain clients to Lincoln for advisory services. No client is under any obligation to engage the services of Lincoln.

Other Investment Adviser Firm. Mr. Danese also serves as an investment adviser representative of Capital Analysts, LLC, an unaffiliated SEC registered investment advisor firm. Mr. Danese may refer certain clients to Capital Analysts, LLC for advisory services. No client is under any obligation to engage the services of Capital Analysts, LLC.

- B. **Licensed Insurance Agent.** Mr. Danese, in his individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Mr. Danese to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Mr. Danese that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Mr. Danese. Clients are reminded that they may purchase insurance products recommended by Mr. Danese through other, non-affiliated insurance agents. **The Registrant's Chief Compliance Officer, Maria Stewart, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Item 5 Additional Compensation

None.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Maria Stewart, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Stewart at (610) 444-9920.

Item 1 Cover Page

A.

Ciara Danese Price

Legacy Solutions, LLC

ADV Part 2B, Brochure Supplement

Dated: March 22, 2024

Contact: Maria Stewart, Chief Compliance Officer

206 North Union Street

Kennett Square, Pennsylvania 19348

B.

This Brochure Supplement provides information about Ciara Danese Price that supplements the Legacy Solutions, LLC Brochure; you should have received a copy of that Brochure. Please contact Maria Stewart, Chief Compliance Officer, if you did *not* receive Legacy Solutions, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Ciara Danese Price is available on the SEC's website at www.adviserinfo.sec.gov

Item 2 Education Background and Business Experience

Ciara Danese Price was born in 1992. Ms. Price graduated from the University of Delaware in 2012 with a Bachelor of Arts degree in mass media communication and political science. Ms. Price has been employed as an investment adviser representative of Legacy Solutions, LLC since November of 2022. Ms. Price has also been a registered representative and investment adviser representative of Lincoln Investment since January of 2015 and an investment adviser representative of Capital Analysts, LLC since September of 2017.

Ms. Price is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, she may refer to herself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and she may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold

the CFP® certification. You may find more information about the CFP® certification at www.cfp.net.

CFP® professionals have met CFP Board's high standards for education, examination, experience, and ethics. To become a CFP® professional, an individual must fulfill the following requirements:

- **Education** – Earn a bachelor's degree or higher from an accredited college or university and complete CFP Board-approved coursework at a college or university through a CFP Board Registered Program. The coursework covers the financial planning subject areas CFP Board has determined are necessary for the competent and professional delivery of financial planning services, as well as a comprehensive financial plan development capstone course. A candidate may satisfy some of the coursework requirement through other qualifying credentials. CFP Board implemented the bachelor's degree or higher requirement in 2007 and the financial planning development capstone course requirement in March 2012. Therefore, a CFP® professional who first became certified before those dates may not have earned a bachelor's or higher degree or completed a financial planning development capstone course.
- **Examination** – Pass the comprehensive CFP® Certification Examination. The examination is designed to assess an individual's ability to integrate and apply a broad base of financial planning knowledge in the context of real-life financial planning situations.
- **Experience** – Complete 6,000 hours of professional experience related to the personal financial planning process, or 4,000 hours of apprenticeship experience that meets additional requirements.
- **Ethics** – Satisfy the Fitness Standards for Candidates for CFP® Certification and Former CFP® Professionals Seeking Reinstatement and agree to be bound by CFP Board's Code of Ethics and Standards of Conduct ("Code and Standards"), which sets forth the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements to remain certified and maintain the right to continue to use the CFP Board Certification Marks:

- **Ethics** – Commit to complying with CFP Board's Code and Standards. This includes a commitment to CFP Board, as part of the certification, to act as a fiduciary, and therefore, act in the best interests of the client, at all times when providing financial advice and financial planning. CFP Board may sanction a CFP® professional who does not abide by this commitment, but CFP Board does not guarantee a CFP® professional's services. A client who seeks a similar commitment should obtain a written engagement that includes a fiduciary obligation to the client.
- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Ms. Price has held the designation of Certified Student Loan Professional (CSLP®) since 2019. This designation is awarded by the Certified Student Loan Advisors Board of Standards and is used by financial professionals who seek to provide information to clients about how to efficiently

repay student loans within the larger scope of their financial plans. Certification requires individuals to have two years of industry experience in financial services or hold a bachelor's degree in business or finance from an accredited college or university. Individuals must also hold a license or registration in a regulated financial services industry (brokerage, investment adviser services, insurance). Unlicensed individuals providing coaching services may qualify for the certificate program subject to the verification of business and individual qualifications. Designees are required to complete an annual competency exam to ensure that they continue to demonstrate the knowledge required to provide student loan repayment advice to clients.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

A. **Registered Representative of Lincoln Investment.** Ms. Price is a registered representative of Lincoln Investment ("Lincoln"), an SEC Registered and FINRA member broker-dealer. Clients may choose to engage Ms. Price in her individual capacity as a registered representative of Lincoln, to implement investment recommendations on a commission basis.

1. **Conflict of Interest.** The recommendation by Ms. Price that a client purchase a securities commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend investment products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any commission products from Ms. Price. Clients are reminded that they may purchase investment products recommended by Ms. Price through other, non-affiliated broker dealers. **The Registrant's Chief Compliance Officer, Maria Stewart, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**
2. **Commissions.** In the event the client chooses to purchase investment products through Lincoln, brokerage commissions will be charged by Lincoln to effect securities transactions, a portion of which commissions shall be paid by Lincoln to Ms. Price. The brokerage commissions charged by Lincoln may be higher or lower than those charged by other broker-dealers. The securities commission business conducted by Ms. Price is separate and apart from Registrant's investment management services discussed in the Registrant's *Brochure*.

Other Investment Adviser Firm. Ms. Price also serves as an investment adviser representative of Lincoln, in its capacity as an unaffiliated SEC registered investment advisor firm. Ms. Price may refer certain clients to Lincoln for advisory services. No client is under any obligation to engage the services of Lincoln.

Other Investment Adviser Firm. Ms. Price also serves as an investment adviser representative of Capital Analysts, LLC, an unaffiliated SEC registered investment advisor firm. Ms. Price may refer certain clients to Capital Analysts, LLC for advisory services. No client is under any obligation to engage the services of Capital Analysts, LLC.

- B. **Licensed Insurance Agent.** Ms. Price, in her individual capacity, is a licensed insurance agent, and may recommend the purchase of certain insurance-related products on a commission basis. Clients can engage Ms. Price to purchase insurance products on a commission basis. **Conflict of Interest:** The recommendation by Ms. Price that a client purchase an insurance commission product presents a *conflict of interest*, as the receipt of commissions may provide an incentive to recommend insurance products based on commissions to be received, rather than on a particular client's need. No client is under any obligation to purchase any insurance commission products from Ms. Price. Clients are reminded that they may purchase insurance products recommended by Ms. Price through other, non-affiliated insurance agents. **The Registrant's Chief Compliance Officer, Maria Stewart, remains available to address any questions that a client or prospective client may have regarding the above conflict of interest.**

Item 5 Additional Compensation

None.

Item 6 Supervision

The Registrant provides investment advisory and supervisory services in accordance with the Registrant's policies and procedures manual. The primary purpose of the Registrant's Rule 206(4)-7 policies and procedures is to comply with the supervision requirements of Section 203(e)(6) of the Investment Advisers Act of 1940 (the "Act"). The Registrant's Chief Compliance Officer, Maria Stewart, is primarily responsible for the implementation of the Registrant's policies and procedures and overseeing the activities of the Registrant's supervised persons. Should an employee, independent contractor, investment adviser representative, or promoter of the Registrant have any questions regarding the applicability/relevance of the Act, the Rules thereunder, any section thereof, or any section of the policies and procedures, he/she should address those questions with the Chief Compliance Officer. Should a client have any questions regarding the Registrant's supervision or compliance practices, please contact Ms. Stewart at (610) 444-9920.

Item 1 Cover Page

A.

Jeffrey R. Hall

Legacy Solutions, LLC

ADV Part 2B, Brochure Supplement

Dated: March 22, 2024

Contact: Maria Stewart, Chief Compliance Officer
206 North Union Street
Kennett Square, Pennsylvania 19348

B.

This Brochure Supplement provides information about Jeffrey R. Hall that supplements the Legacy Solutions, LLC Brochure; you should have received a copy of that Brochure. Please contact Maria Stewart, Chief Compliance Officer, if you did *not* receive Legacy Solutions, LLC's Brochure or if you have any questions about the contents of this supplement.

Additional information about Jeffrey R. Hall is available on the SEC's website at www.adviserinfo.sec.gov

Item 2 Education Background and Business Experience

Jeffrey R. Hall was born in 1981. Mr. Hall graduated from Pennsylvania State University in 2004 with a Bachelor of Science degree in Operations and Information Systems Management. Mr. Hall has been employed as an investment adviser representative of Legacy Solutions, LLC since November of 2022. Mr. Hall has also been a registered representative and investment adviser representative of Lincoln Investment and an investment adviser representative of Capital Analysts, LLC since June of 2012.

Mr. Hall is certified for financial planning services in the United States by Certified Financial Planner Board of Standards, Inc. ("CFP Board"). Therefore, he may refer to himself as a CERTIFIED FINANCIAL PLANNER™ professional or a CFP® professional, and he may use these and CFP Board's other certification marks (the "CFP Board Certification Marks"). The CFP® certification is voluntary. No federal or state law or regulation requires financial planners to hold

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- **Continuing Education** – Complete 30 hours of continuing education every two years to maintain competence, demonstrate specified levels of knowledge, skills, and abilities, and keep up with developments in financial planning. Two of the hours must address the Code and Standards.

Mr. Hall became an Accredited Investment Fiduciary® (AIF®) Designee in 2018. The AIF® Designation certifies that the recipient has demonstrated specialized knowledge of fiduciary standards of care and their application to the investment management process. To receive the AIF®

Designation, the individual must meet prerequisite criteria based on a combination of education, relevant industry experience, and/or ongoing professional development, complete a training program, successfully pass a comprehensive, closed-book final examination under the supervision of a proctor and agree to abide by the Code of Ethics and Conduct Standards. In order to maintain the AIF[®] Designation, the individual must annually attest to the Code of Ethics and Conduct Standards, and accrue and report a minimum of six hours of continuing education. The Designation is administered by the Center for Fiduciary Studies, the certification division of Fi360 that is responsible for ongoing management of the program. Fi360 is accredited by the ANSI National Accreditation Board for the AIF[®] Designation, making it one of few independently accredited designations recognized by FINRA.

Item 3 Disciplinary Information

None.

Item 4 Other Business Activities

- A. **Registered Representative of Lincoln Investment.** Mr. Hall is a registered representative of Lincoln Investment (“Lincoln”), an SEC Registered and FINRA member broker-dealer. Clients may choose to engage Mr. Hall in his individual capacity as a registered representative of Lincoln, to implement investment recommendations on a commission basis.
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Item 5 Additional Compensation

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