



Investment Advisor Representative

**Erin Sue Lane
CRD # 3202545**

Shepherd Financial, LLC
111 Congressional Boulevard, Suite 100
Carmel, Indiana 46032
Phone: (317) 975-5033

February 25, 2025

Associated with the following Registered Investment Advisor

**Shepherd Financial Investment Advisory, LLC
CRD # 288623**

111 CONGRESSIONAL BLVD SUITE 100
CARMEL, IN 46032
(317) 975-5033

This brochure supplement provides information about your Investment Adviser Representative (“your Advisor”), Erin Sue Lane, who is registered and associated with Shepherd Financial Investment Advisory, LLC (Shepherd Financial Investment Advisory). This brochure is a supplement to the Shepherd Financial Investment Advisory Form ADV 2A brochures, of which you should have already received.

Additional information about your Investment Adviser Representative is available via the U.S. Securities and Exchange Commission's website at www.adviserinfo.sec.gov.

Please Note: If you have not received a copy of the Form ADV 2A brochure, please contact Steven M. Wylam, Chief Compliance Officer, at (317) 975-5034. Brochure requests and additional questions may also be directed to Shepherd Financial Investment Advisory at (317) 975-5033.

EDUCATIONAL BACKGROUND & BUSINESS EXPERIENCE

Name: Erin Sue Lane

Born: 1975

Education:

MBA Business, Myers University - 2006

BS Management, Indiana Wesleyan University - 2005

Business Experience

Investment Adviser Representative, Shepherd Financial Investment Advisory, LLC, January 2025 – Present

Client Relationship Consultant, Shepherd Financial, January 2025 – Present

Senior Consultant, T. Rowe Price, 06/2024 – 01/2025

Lead Manager, T. Rowe Price, 09/2013 – 06/2024

DISCIPLINARY INFORMATION

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

OTHER BUSINESS ACTIVITIES

Erin Sue Lane is a registered representative. From time to time, she will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Shepherd Financial Investment Advisory LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Shepherd Financial Investment Advisory LLC in such individuals outside capacity.

Erin Sue Lane serves as a Client Relationship Consultant at Shepherd Financial, LLC, specializing in retirement plans. She provides exceptional client service by assisting plan sponsors and participants with account management, financial inquiries, and plan administration. Erin ensures smooth communication, resolves issues efficiently, and supports overall client satisfaction by delivering personalized guidance and proactive solutions.

ADDITIONAL COMPENSATION

Please refer to the Fees and Compensation section in Shepherd Financial Investment Advisory's Form ADV 2A of which should have been provided to you by your Advisor. This section describes in detail the potential other forms of compensation, in addition to the advisory fee, that may be shared with Ms. Lane and other Financial Advisors by Shepherd Financial Investment Advisory.

For non-advisory product purchases, your Advisor may receive a sales commission which may be in addition to any advisory fees received on your advisory assets. In these situations, your Advisor may be financially incentivized to offer you both non-advisory and advisory products and services.

Lincoln Investment provides incentives, such as sales conferences, for financial advisors, 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. Shepherd Financial Investment Advisory hold their Financial Advisors to a Code of Ethics and owe a fiduciary duty to all clients and require your Financial Advisor to always place your interests above his or her own and to avoid any recommendation that would not be in your best interest. It is each financial advisor's responsibility to understand and adhere to the requirements of the Code of Ethics, as well as applicable laws, regulations, and rules.

SUPERVISION

As a representative of Shepherd Financial Investment Advisory LLC, Erin Sue Lane is supervised by Steven Wylam, the firm's Chief Compliance Officer. Steven Wylam is responsible for ensuring that Erin Sue Lane adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Steven Wylam is (317) 975-5033.