

David O’Neill, CFP® , CLU/ChFC

David O’Neill manages the offering of banking products and services through H.D. Vest Advisors. He started with H.D. Vest as a Recruiter in 1986. He moved over to Compliance shortly thereafter, and was the Compliance Manager for four years, and the Chief Compliance Officer for eight years. In 2001, David started the Banking Services department at H.D. Vest.

David is a graduate of the University of Notre Dame and is a CERTIFIED FINANCIAL PLANNER™, Certified Life Underwriter, Chartered Financial Consultant, Chartered Advisor for Senior Living, Microsoft Certified Systems Engineer, Microsoft Certified Database Administrator, Texas and Florida mortgage broker, California real estate broker, Texas life and health insurance agent, and a Texas property and casualty agent. David also has the following FINRA securities licenses: Series 4, 7, 24, 27, 63 and 65.

Investment and Insurance Products:
▶ NOT FDIC Insured ▶ NO Bank Guarantee ▶ MAY Lose Value