

Neal Heifetz

Neal Heifetz is the Executive Manager of Operations for H.D. Vest Financial Services®. Neal is responsible for the activities of all annuity, brokerage, and mutual fund operations of the firm, which currently manages assets of \$30 billion through a network of 5,300 independent Advisors. In addition, he manages various support functions including document control, customer service, commissions, and managed products. Neal is a member of the executive management committee that establishes strategic business planning for the firm. Neal holds the title of Assistant Secretary with H.D. Vest, Inc. and five of its subsidiaries.

Neal has been with H.D. Vest for twelve years, and has been in the financial services industry for twenty nine years. Prior to joining H.D. Vest, Neal was the director of operations at Corelink Financial and held management positions at various financial institutions including banks, trust companies, transfer agents and custodians.

Neal earned his bachelor of science degree in accountancy from Bentley College. Neal is a general securities representative, a registered investment advisor, a general securities principal and a municipal securities principal.

Neal is a member of the Securities Industry and Financial Markets Association, the National Investment Company Service Association, and the Dallas Securities Traders Association.

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