

DAVID L. NEELEY, Jr

COMMUNITY INVOLVEMENT

PINEVILLE CHAMBER OF COMMERCE

Business Community Support

Board Chair – Jul 2019 – Present

- Power Team Alliance Program Chair
- Membership Development

UNITED STATES BARTENDERS' GUILD - CHARLOTTE

HOSPITALITY/SERVICE INDUSTRY - CHARLOTTE, NC

Chapter Member – Aug 2020 – Present

BIG BROTHERS BIG SISTERS OF CENTRAL CAROLINAS

YOUTH MENTORING - CHARLOTTE, NC

Board Member – Jul 2012 – Dec 2019

- Community-Based mentor
- Program Committee Member

PROFESSIONAL EXPERIENCE

SUMMIT ADVISORY GROUP - Charlotte, NC (FINANCIAL PLANNING FIRM)

Financial Advisor February 2019 – Present

- Ascertain client financial goals relative to how they want to live life
- Analyze client Cash Flow, Protection status, Assets, Liabilities and Net Worth
- Develop personal, strategic plans to bridge gap between Current Status to Goals

CONSOLIDATED PLANNING, INC. - Charlotte, NC (FINANCIAL PLANNING FIRM)

Financial Advisor October 2018– February 2019

- Ascertain client Goals and Develop personal, strategic plans to bridge Gap to Goals
- Analyze client Cash Flow, Protection status, Assets, Liabilities and Net Worth
- Develop personal, strategic plans to bridge gap between Current Status to Goals

SUMMIT ADVISORY GROUP - Charlotte, NC (FINANCIAL PLANNING FIRM)

Financial Advisor October 2015– October 2018

- Ascertain client Goals and Develop personal, strategic plans to bridge Gap to Goals
- Analyze client Cash Flow, Protection status, Assets, Liabilities and Net Worth
- Develop personal, strategic plans to bridge gap between Current Status to Goals

MERRILL LYNCH, PIERCE, FENNER AND SMITH - Charlotte, NC (INVESTMENT FIRM)

Financial Advisor February 2014 – September 2015

- Listen to and review client and potential client financial goals and current status
- Recommend financial solutions and tools most suitable for clients

LICENSING AND EDUCATION

SERIES 7 – GENERAL SECURITIES LICENSE

SERIES 66 – UNIFORM COMBINED STATE LAW

TITLE INSURANCE LICENSE

LIFE AND HEALTH INSURANCE LICENSE

PROPERTY AND CASUALTY INSURANCE LICENSE

MEDICARE INSURANCE LICENSE

MERCER UNIVERSITY - Macon, GA

Bachelor of Arts – Communication

COMPETENCIES

Relationship Broker
Consultative Sales
Presentation / Public Speaking

Negotiations
Strategic Business Planning
Mentoring / Coaching