

Jeffrey J. Klein

CFP®, CFS

Jeff Klein currently serves as the executive manager of Strategic Business Units (SBUs). In this role, he directs the growth and development of Advisory Services, Insurance Services, Recruiting, Communications, and Advisor and Sponsor Relations. Klein joined H.D. Vest Financial Services® in 1990. He previously directed the Insurance Operations, Marketing, Financial Planning Support, Technical Investment Support and Training areas prior to his promotion to executive manager.

Jeff's experience includes four years of direct sales in life, disability and nonqualified retirement planning and two years in the employee resource management field. He has written materials and trained Advisors, as well as industry professionals, on the subjects of business benchmarking and business succession. He has also contributed articles on life insurance retirement planning to the American Society of Certified Life Underwriters and Chartered Financial Consultants. Jeff is a Certified Fund Specialist and a CERTIFIED FINANCIAL PLANNER™ professional. He has earned FINRA securities licenses Series 7, 24, 63, life and variable insurance licenses, and is an advisory representative.

Jeff holds an undergraduate degree in economics from Southern Methodist University. As a swimmer at SMU, Jeff twice received the scholar athlete award. Jeff completed the Boston Marathon in 2001, 2002, 2003 and 2004. He and his wife, Krista, have four children and he loves waterskiing and watching his children's multiple sporting activities.

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