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“ HAVING A STRONG
FINANCIAL EDUCATION
LEADS TO A SOLID
FINANCIAL FUTURE.

BRIAN M. NEYLAND, CFP®

PROGRAM MANAGER

Brian has over 30 years of experience in the financial services industry. He is currently the Community Financial Institution Director for Cetera Investment Services, for Texas, New Mexico and Oklahoma. Primary responsibilities include managing the ongoing relationship between Cetera Investment Services (broker-dealer), Vantage Bank, and all the financial professionals associated with the investment and insurance programs.

EDUCATION

B.S. Accounting, St. John's University in New York. Currently holds Financial Industry Regulatory Authority (FINRA) Series 6, 7, 24, 26, 63, and 65 License and Registration. Maintains Life, Accident, Health, and Property and Casualty Insurance Licenses. Brian is a CERTIFIED FINANCIAL PLANNER™ professional.

SERVICE VALUE

As the Community Financial Institution Director/Program Manager for Vantage Wealth, Brian focuses on using his extensive industry experience and knowledge to assist the financial professionals who work with him, Vantage Bank employees, and most importantly, Vantage Bank customers. He is experienced in financial planning, investment management, portfolio management, insurance planning, retirement planning, and business and estate planning strategies. He believes in implementing a highly individualized strategic consulting approach. Brian develops solutions that truly meet his client's short, mid, and long-term investment and insurance objectives, including risk and time horizons. As a resource, he has access to Cetera Investment Services, a leading national independent broker/dealer that works with hundreds of financial institutions and over 12,000 financial professionals across the U.S. Brian utilizes Cetera's Independent Investment Research Team, Financial Planning Team, Retirement Solutions Team, and Advanced Planning Group to ensure success for his clients. Brian resides in San Antonio with his wife, Carmen, and family.