



LUKE A. NEFF

MSFP, CFP®, AWMA®, MPAS® CRPC®

BIO

Luke A. Neff, MSFP, CFP®, AWMA®, MPAS® CRPC®, Luke Neff regularly partners with individuals and families to make smart financial decisions through comprehensive financial planning and portfolio management. He covers topics such as tax-sensitive investing, retirement-income planning, charitable giving strategies, estate planning and many other areas of personal financial well-being. Luke values life-long-learning and has demonstrated this through formal higher education earning a Master of Science in Personal Financial Planning and many other certifications.

Luke is a member of the Financial Planning Association®. He regularly contributes to local media outlets regarding trends in financial markets. When he is not working, he can be found around town doing various activities with his wife and four children.

CONTACT

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EDUCATION

Master of Science – Personal Financial Planning
College for Financial Planning

Bachelor of Arts – Religious Studies
Southeastern College

CERTIFICATIONS

CFP® – Certified Financial Planner™

AWMA® – Accredited Wealth Management AdvisorSM

MPAS® – Master Planner Advanced StudiesSM

CRPC® – Chartered Retirement Planning CounselorSM

EXPERIENCE

Day Air Credit Union - Financial Advisor
2015–Present

PNC Investments - Financial Specialist
2012–2015

State Employees' Credit Union - Senior Financial Services Officer
2009–2012

PROFESSIONAL ORGANIZATIONS

FPA® – Financial Planning Association