

Neil Levy has 15 years of investment expertise. His extensive career on Wall Street includes 6 years as a portfolio manager for a large equity fund and as president and founder of Highpoint Capital Advisors, LLC., an investment limited partnership.

In addition to his experience as a portfolio manager, Neil has held diverse positions within the investment industry including as an equity analyst at boutique investment bank, Needham & Co., and as a controller at Cantor Fitzgerald in Manhattan.

Neil is a CERTIFIED FINANCIAL PLANNER™ (CFP) and a CERTIFIED PUBLIC ACCOUNTANT (CPA). He began his career in public accounting for Goldstein Golub & Kessler where he was entrenched in the accounting and business functions of a variety of industries including the financial services and hedge fund industries.

Along with his passion for wealth planning, Neil utilizes his strong analytical skills, investment expertise, institutional money management skills, and extensive financial education to provide clients with comprehensive and robust solutions to all their financial needs.

Neil received a B.S. in Accounting from Lehigh University in 1993 and earned his MBA from New York University's Stern school of Business in 2000.

He is a member of the CHARTERED FINANCIAL ANALYST (CFA) Institute as well as the South Florida Society of Securities Analysts and has been the feature of published articles such as business magazine *Florida Trend*.

Neil is a Registered Principal and an Investment Advisor Representative with FINRA.

Neil is involved with numerous charities including the Jewish Federation of the Palm Beaches, and Kids in Distress. He is also a board member of TYG foundation.