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CONTACT:
National Ethics Association (NEA)
Phone: 800-282-1831
Fax: 760-804-7508

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James H. Heafner

President/ CEO

Member since	08/08/2006
Member through	07/18/2019
Company	Heafner Financial Solutions, Inc.
Address	10700 Sikes Place, Suite 200, Charlotte, NC 28277 US
Website	http://www.heafnerfinancial.com
Phone Number	(704) 552-1230
Industry	Financial Services

Description

Jims desire is to educate seniors about the challenges that lie ahead and to find solutions that best satisfy each persons goals. Maximizing the enjoyment of ones assets in retirement minimizing tax consequences in retirement and on the transfer of assets to heirs and planning for the possible need of for long-term care can be significant challenges unless we are prepared.

Education

Cum Laude graduate in American Studies UNC-Chapel Hill MBA UNC Chapel Hill NASD Series 6 and 63 Life and Health Medicare and Long-term care Licenses Annuity University IRA University

Associations

Society of Certified Senior Planners National Ethic Bureau Better Business Bureau Toastmasters past board member of the National Sporting Goods Association and North Carolina Entrepreneurial Development Board