

*This brochure supplement provides information about Jerry Neil Hefley that supplements the Bright Futures Wealth Management, LLC brochure. You should have received a copy of that brochure. Please contact Jerry Neil Hefley if you did not receive Bright Futures Wealth Management, LLC's brochure or if you have any questions about the contents of this supplement.*

*Additional information about Jerry Neil Hefley is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

# **Bright Futures Wealth Management, LLC**

## **Form ADV Part 2B – Individual Disclosure Brochure**

*for*

**Jerry Neil Hefley**

Personal CRD Number: 1468922

Investment Adviser Representative

Bright Futures Wealth Management, LLC  
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Macedon, NY 14502  
(315) 538-8746  
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UPDATED: 10/09/2020

## Item 2: Educational Background and Business Experience

**Name:** Jerry Neil Hefley                      **Born:** 1952

### Educational Background and Professional Designations:

#### Education:

Master of Science in Education Educational Administration, Brockport University - 1996  
1976 Music Education/History, East Central Oklahoma U - 1976

#### Business Background:

01/2017 - Present	Investment Advisor Representative Bright Futures Wealth Management, LLC
01/2012 - Present	Registered Representative/Investment Adviser Representative Cetera Advisors LLC
01/2005 - 12/2012	Registered Representative Multi-Financial Securities

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

## Item 4: Other Business Activities

Jerry Neil Hefley is a registered representative and investment adviser representative with Cetera Advisors LLC From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. Bright Futures Wealth Management, LLC always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of Bright Futures Wealth Management, LLC in such individual's outside capacity.

Jerry Neil Hefley is a licensed insurance agent. From time to time, he will offer clients advice or products from those activities. Clients should be aware that these services pay a commission and involve a conflict of interest, as commissionable products conflict with the fiduciary duties of a registered investment adviser. Bright Futures Wealth Management, LLC always acts in the best interest of the client; including the sale of commissionable products to advisory clients. Clients always have the right to decide whether or not to utilize the services of any representative of Bright Futures Wealth Management, LLC in such individual's outside capacities.

### **Item 5: Additional Compensation**

In addition to advisory fees, Jerry Neil Hefley earns sales incentives or awards from Cetera based on the value of assets under management, investment products sold, number of sales, client referrals, amount of new deposits or amount of new accounts at Cetera.

Bright Futures Wealth Management, LLC does not provide indirect compensation such as sale credits, forgivable loans or others mentioned above to Jerry Neil Hefley.

### **Item 6: Supervision**

As a representative of Bright Futures Wealth Management, LLC, Jerry Neil Hefley is supervised by Craig LeFeber, the firm's Chief Compliance Officer. Craig LeFeber is responsible for ensuring that Jerry Neil Hefley adheres to all required regulations regarding the activities of an Investment Adviser Representative, as well as all policies and procedures outlined in the firm's Code of Ethics and compliance manual. The phone number for Craig LeFeber is (585) 305-8518.