



## **Jean Heath Joins Clearstead Advisors to Lead National Sales for Firm's Advisor Solutions Offering**

**Norfolk, VA, October 29, 2024:** Jean Heath, CIMA®, has been named Senior Managing Director, Advisor Solutions National Sales with Clearstead Advisors, and will lead sales efforts for the firm's Advisor Solutions offering through Clearstead Advisory Solutions, a division of Clearstead Advisors, with offices in Norfolk and Roanoke, Virginia, as well as Raleigh, North Carolina.

Before joining Clearstead, Ms. Heath served as Managing Director, Head of Asset Manager Network at Investnet, Inc., after initially serving as a Managing Director of Enterprise Consulting, RIA Network. She was also previously a key member of the National Accounts team at Brinker Capital, successfully led a new business line, Brinker Investment Services, among other sales, marketing, and product development achievements. Throughout her career, Ms. Heath has demonstrated strong performance and deep relationships with Registered Investment Advisors ("RIAs"), regional bank trusts and regional broker dealers because of her nearly 20 years in sales, national accounts and product innovation with Brinker Capital. These attributes make her a valuable addition to the Clearstead team.

Ms. Heath holds a Bachelor of Arts degree in English Language and Literature from New Jersey City University. She is currently a member of the Board of the Money Management Institute and holds the Certified Investment Management Analyst (CIMA®) designation.

Of this announcement, Brad Knapp, CFA, CAIA, President of Clearstead, said, "Jean's expertise in national sales and connections within the RIA space make her an excellent fit for our team. We are excited to welcome her to Clearstead and look forward to the positive impact she will have on our Advisor Solutions offering and growth."

Wilbanks Partners assisted in this recruitment, helping identify Jean's exceptional expertise and experience for this important role.

**About Clearstead Advisors, LLC:** Founded in 1989, and headquartered in Cleveland OH, Clearstead is an independent financial advisory firm serving wealthy families and leading institutions across the country. As a fiduciary, it provides wealth management services and investment consulting to enable clients to meet their financial objectives, achieve their aspirations, and build strong futures. Learn more at: <https://www.clearstead.com>

### **Media Contact:**

[Media@clearstead.com](mailto:Media@clearstead.com)