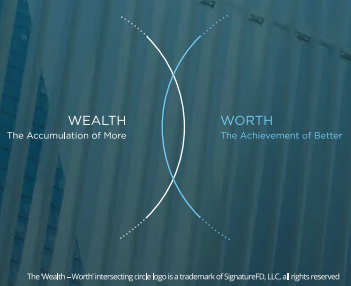


**SIGNATUREFD UNDERSTANDS THE RELATIONSHIP BETWEEN WEALTH AND WORTH.**

We define wealth as the accumulation of more and worth as the achievement of better. At the intersection of Wealth & Worth is where we can help define what "have it all" means to you.

[SPEAK TO AN ADVISOR →](#)



**QUICK LINKS:** [Our Approach](#) | [Net Worthwhile™](#) | [News + Insights](#) | [Signature Solutions](#) | [Impact](#)

**UNDERSTANDING YOUR UNIQUE PERSPECTIVE AND MINDSET IS KEY TO PLANNING YOUR WEALTH STRATEGY AND DISCOVERING THE SHORTEST PATH TO NET WORTHWHILE™.**

[TAKE THE QUIZ →](#)

**TRUE WEALTH IS BIGGER THAN JUST THE ACCUMULATION OF MORE**

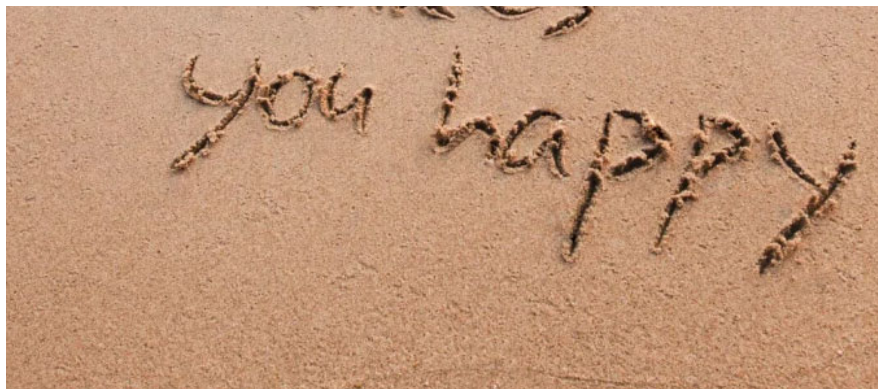
Our clients are looking for more than just more wealth — they want their wealth to enrich the people and things that are important to them. More meaning. More satisfaction. More of what's worthwhile in life.

Our financial advisors want to know: Where do you see yourself in ten years? Who are the people you want to take care of? What brings you joy?

**WE BELIEVE IN HELPING OUR CLIENTS ACHIEVE WEALTH BEYOND MONEY™ —**

**FINANCIAL SECURITY IS JUST THE FIRST STEP.**





**\*SERVING CLIENTS FOR OVER 25 YEARS**

ASSETS UNDER MANAGEMENT (AS OF 3/22)	CLIENT RETENTION RATE*	EMPLOYEE RETENTION RATE*	CURRENTLY SERVING
<b>\$6.9 BILLION</b>	<b>97%</b>	<b>96%</b>	<b>1,500+ FAMILIES</b> (as of 3/22)

Please Note: Should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results or satisfaction if SignatureFD is engaged, or continues to be engaged, to provide investment advisory services.

**SIGNATURE SOLUTIONS**

**WEALTH MANAGEMENT, EVOLVED**

Our approach is different because it doesn't start with 'who we are' – it starts with who you are. It turns out that 'one-size fits all' doesn't actually fit anyone very well. By custom-designing a plan with your financial advisor that puts you at the center of all decisions, you'll be in the best position to grow, protect, give and live your wealth to the fullest.

**SIGNATUREEXEC**

*You take care of your company, but are you confident you are doing all you can with your executive benefits and your personal wealth to be ready for what's next in life? Our executive advisors are here to help.*

[LEARN MORE →](#)

**SIGNATUREGENEROSITY**

*Embracing a spirit of generosity is a way to live a more fulfilled, vibrant life and can trigger surprising ripple effects, transforming your life and the lives of others in ways you may never have imagined. Our generosity advisors will help you get there.*

[LEARN MORE →](#)

**SIGNATUREHEALTH**

*A person's well-being depends on more than just physical health. Commitments to family, patients, and practice can leave little time for health care professionals like you to focus on long-term financial security. Our advisors know just how to help.*

[LEARN MORE →](#)

**SIGNATURELAW**

*As a successful attorney, your time is one of your most valuable assets. Every day, you must balance your professional obligations to your clients and your firm with your commitments to your family, friends, and personal interests. We have advisors equipped to help you.*

[LEARN MORE →](#)

**SIGNATUREWOMEN**

**SIGNATUREENTREPRENEUR**

At SignatureFD, our advisors understand that a woman's wealth management needs are as unique as she is. In response to that, we created SignatureWOMEN, our innovative solution to helping women like you build and grow their wealth.

[LEARN MORE →](#)

As an entrepreneur, your business requires an inordinate amount of your time and energy. At SignatureFD our advisors help business owners achieve and maintain independence and balance in their lives.

[LEARN MORE →](#)

### SIGNATUREPRO

As a professional athlete, you have seen the results when talent, hard work, and the right coaching come together. Our advisor team specializes in helping you apply the same principles you've used to succeed on the field to your off-the-field opportunities.

[LEARN MORE →](#)

### SIGNATUREVETERINARY

Combining comprehensive wealth advisory services with in depth experience advising veterinarians during various stages of the hospital ownership life cycle, we believe we are uniquely qualified to help you achieve your Net Worthwhile™.

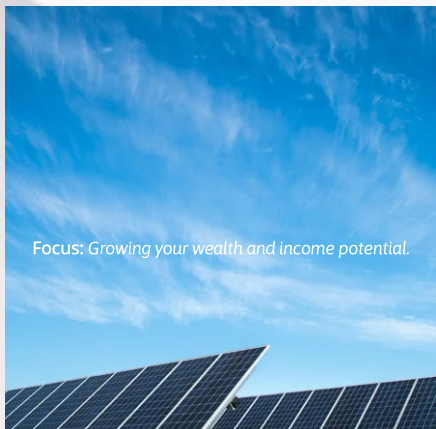
[LEARN MORE →](#)

## READY TO DISCOVER YOUR NET WORTHWHILE™?

[SPEAK WITH AN ADVISOR](#)

## SOLUTIONS FOR REAL PEOPLE

Understanding your unique perspective and mindset is the key to helping you find the shortest path to Net Worthwhile™



Focus: Growing your wealth and income potential.

#### GROW – SERVICES

- Asset allocation and financial portfolio design with an advisor
- Manager due diligence, selection and monitoring
- Objective fee-based approach using independent, 3rd-party specialist managers
- Strategic and tactical asset allocation within broadly diversified portfolios using both active and passive solutions
- Total return-focused and tax-managed portfolios
- Unique exposure to alternative and private financial investments, as appropriate

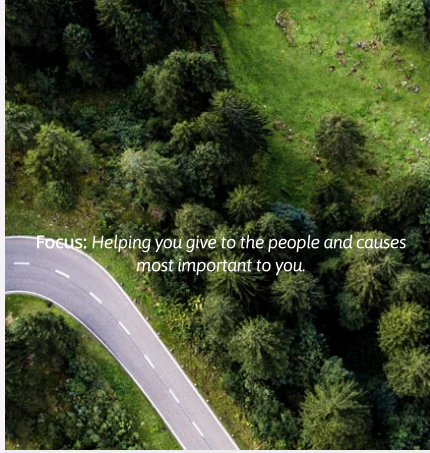
#### PROTECT – SERVICES

- Asset protection consulting
- Trust design and implementation



- *Eldercare planning with an advisor*
- *Employee benefits analysis*
- *Risk management and insurance consulting:*
  - *Life insurance*
  - *Disability insurance*
  - *Long-term care insurance*
  - *Property and casualty insurance*

*Focus: Protecting your family, lifestyle and property.*



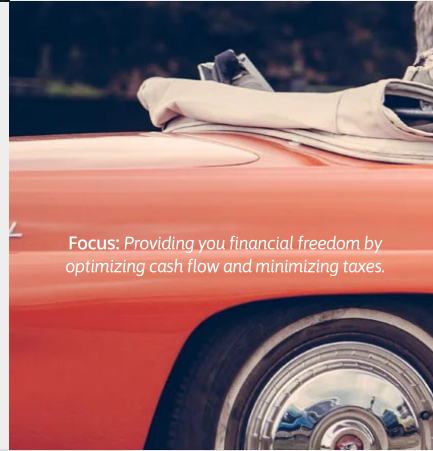
*Focus: Helping you give to the people and causes most important to you.*

GIVE – SERVICES

- *Estate and legacy planning*
- *Estate and trust administration*
- *Family wealth and finances counseling*
- *Facilitation of family meetings*
- *Special needs planning with an advisor*
- *Generosity/Philanthropic plan*

LIVE – SERVICES

- *Cash flow planning with an advisor*
- *Debt analysis and financial structuring*
- *College/Education planning*
- *Executive compensation planning*
- *Retirement planning*
- *Stock option analysis and planning*
- *Income tax planning with an advisor*



*Focus: Providing you financial freedom by optimizing cash flow and minimizing taxes.*

Please Note: Limitations. The scope of any financial planning and consulting services to be provided depends upon the terms of the engagement, and the specific requests and needs of the client. SignatureFD does not serve as an attorney or accountant. SignatureFD does not prepare legal documents or tax returns. Please Also Note: Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by SignatureFD) or any planning or consulting services, will be profitable, equal any historical performance levels, or prove successful.

**THE LATEST NEWS AND INSIGHTS  
FROM SIGNATUREFD FINANCIAL  
ADVISORS IN CHARLOTTE, NC AND  
ATLANTA, GA**

We're more than just your financial advisor in Charlotte, NC and Atlanta, GA. We offer ongoing education and support in all facets of life—from finances, lifestyle, business, and goal setting—to get you from where you are to where you want to be.

PODCAST RECAP: WHY DOES NET WORTHWHILE  
MATTER?

[NET WORTHWHILE](#)

ELDER CARE CHECKLIST

[SIGNATUREWOMEN](#)

SIGNATUREFD CEO PENS ARTICLE FOR INC. MAGAZINE

[SIGNATUREFD](#)

SignatureFD's CEO, Heather Fortner, recently sat down with The Business of Intuition Podcast to discuss activating wealth and our unique brand promise: Net Worthwhile™.

In addition to raising children and getting them prepared for the adult world, a lot of us are also dealing with (or starting to deal with) caring for aging parents.

What Comes After the Glass Ceiling Is Broken: 5 strategies for fulfilling the duty leaders have to women and people of color

**SIGNATUREFD CELEBRATES GIVING TUESDAY**

[SIGNATUREGENEROSITY](#)

You are undoubtedly familiar with Black Friday and Cyber Monday, but have you heard of Giving Tuesday? Created in 2012 at the 92nd Street Y and its Belfer Center for...

**HOLISTIC WEALTH MANAGEMENT WITH HEATHER FORTNER**

[PODCAST, SIGNATUREWOMEN](#)

SignatureFD's CEO Heather Robertson Fortner talks about SignatureFD's brand promise Net Worthwhile and how it helps connect the pieces of wealth, so they can work more intentionally.

**EMPOWER TO IN POWER #7: CHANGING LIVES BY PROVIDING SHELTER WITH LISA GORDON**

[PODCAST, SIGNATUREWOMEN](#)

Lisa Gordon, CPA, is President and Chief Executive Officer of Atlanta Habitat for Humanity, one of the top 10 Habitat for Humanity International affiliates in the United States. She is...

[LEARN MORE →](#)

**OUR APPROACH**

It is our belief that people fall into one of four investment mindsets. Understanding their unique perspective and mindset is the key to helping our clients find the shortest path to Net Worthwhile™.

**SOLUTIONS FOR REAL PEOPLE**

**GROW**  
FOCUS: Growing your wealth and income potential.

**PROTECT**  
FOCUS: Protecting your family, lifestyle and property.

**LIVE**  
FOCUS: Providing you financial freedom by optimizing cash flow and minimizing taxes.

**GIVE**  
FOCUS: Helping you give to the people and causes most important to you.

[LEARN MORE →](#)

## PROUD TO BE AN ACTIVE PART OF OUR COMMUNITIES

We are rooted in the communities we serve and are proud to support the organizations that help our city thrive

[LEARN MORE →](#)

**OUR COMMITMENT TO CULTURE + DIVERSITY AT SIGNATUREFD**

PROUD TO BE A FEMALE LED	41%	44%	100%
ADVISORY FIRM	OF OUR LEADERSHIP TEAM IS FEMALE	MINORITY LEADERS ON OUR LEADERSHIP TEAM	OF OUR TEAM DONATES TIME TO THE COMMUNITY

[LEARN MORE →](#)

**PUT YOUR MONEY WHERE YOUR HEART IS**

Ultimately, Net Worthwhile™ inspires you to think about your wealth in new ways — allowing you to make a bigger impact on the people and things most important to you.

**UNDERSTANDING YOUR UNIQUE PERSPECTIVE AND MINDSET IS KEY TO PLANNING YOUR WEALTH STRATEGY AND DISCOVERING THE SHORTEST PATH TO NET WORTHWHILE™.**

[TAKE THE QUIZ](#)

**PROUD TO BE AN ACTIVE PART OF OUR COMMUNITIES**

We love giving back to our local communities in Charlotte, NC and Atlanta, GA. Click the city below to learn more.

[ATLANTA, GA](#)

[CHARLOTTE, NC](#)