SIGNATUREFD

Financial Design for Life

Financial Design

OUR HOLISTIC APPROACH TO WEALTH MANAGEMENT

Effective wealth management may seem overwhelming—from understanding your personal goals and values to analyzing current investments, cash flow, debt, income taxes, risk management needs and more. But at SignatureFD, we believe managing your wealth is more than just managing your money. It is about developing a personalized financial strategy that is as unique to you as your own signature.

Our holistic approach and innovative discovery process helps you build and live a great life—on purpose. We offer a variety of signature services designed to address the complex financial and investment needs of high-net-worth individuals, allowing you to live confidently, fully, and purposefully.

DESIGNING A GREAT LIFE

- Assessing your financial confidence
- Financial foundation checkup
- Organizing your financial life
- Values, vision and goals discovery, alignment and prioritization
- Wealth Blueprint development and implementation

CASH FLOW, DEBT & TAX MANAGEMENT

- Cash flow planning
- Debt analysis and structuring
- Mortgage origination services
- Education funding
- Executive compensation planning
- Retirement planning
- Stock option analysis and planning
- Tax planning

ASSET MANAGEMENT

- Asset allocation and portfolio design
- Hedging and diversification strategies
- Investment policy statement design
- Manager due diligence, selection and monitoring
- Objective fee-based approach using independent third-party specialist managers
- Portfolio management, monitoring and reporting
- 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 investments, as appropriate
- Value-added investment performance

ASSET PROTECTION

- Asset protection consulting
- Eldercare planning
- Employee benefits analysis
- Risk management and insurance consulting:
  - Life insurance
  - Disability insurance
  - Long-term-care insurance
  - Property and casualty insurance

WEALTH TRANSFER PLANNING

- Estate and legacy planning
- Estate and trust administration
- Family wealth counseling and facilitation of family meetings
- Family business consulting
- Special needs planning
- Strategic philanthropy

LIVE CONFIDENTLY

Your wealth represents security. At SignatureFD, our goal is to give you peace of mind knowing that the important details of your financial needs are being attended to in a thoughtful, thorough and personal manner. We work daily to deliver you exceptional client experiences that provide order and clarity to simplify your financial life, secure your future, and reduce your risks—allowing you to focus on the things that really matter.

LIVE FULLY

Your wealth represents freedom. At SignatureFD, we believe that by creating a personalized wealth program designed around your life's values, vision and goals, we can make your wealth work for you, freeing you to live a fully satisfying life. A life where you grow your experiences, your achievements, your talents and your memories. A life where you realize that wealth is so much more than just financial. A life on your own terms.

LIVE PURPOSEFULLY

Your wealth represents opportunity and responsibility. At SignatureFD, we believe that when you are confident in your financial future and free to determine what is truly most important in your life, you can prioritize accordingly. You become empowered to live your life with purpose, using all of your wealth—be it money, time, talents, wisdom, health, influence or relationships—to make a positive difference in the lives of your family, friends, community and society.

live CONFIDENTLY fully PURPOSEFULLY

SIGNATURE FD

1230 Peachtree Street, NE   Suite 1800   Atlanta, GA 30309   404 253 7600   www.signaturefd.com