AAKASH PANCHAL
PORTFOLIO ANALYST

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My Net Worthwhile® is strategically aligning my clients' portfolios to help them achieve their short- and long-term financial goals.

Calculated and empathetic, Aakash works closely with the investment team to manage client portfolios. His analysis helps ensure clients' accounts align with their financial goals. In addition, he is responsible for making tactical shifts and executing trades within client portfolios.

He supports the investment team by ensuring portfolios are maintained in terms of their IPS. He also works alongside advisors by suggesting trades, changing asset allocations, and advising on implementing various investment strategies within client portfolios. He previously worked at E*TRADE by Morgan Stanley on the Executive Services (Stock Plan) team, wrote his senior thesis on the allocation and effects of value and growth stock performance within a portfolio, and graduated from the University of Georgia with a degree in Finance & Economics. His certification/concentration is in pricing and valuation.

Aakash loves playing golf, watching hockey, and playing poker with his friends on the weekends. He has even made a hole-in-one! He also volunteers at his local temple, where they organize annual Hindu festivals and social activities for the community.

*Please Note: Limitations. The achievement of any professional designation, certification, degree, or license, recognition by publications, media, or other organizations, membership in any professional organization, or any amount of prior experience or success, 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.