SIGNATUREFD

EMILY ROBERTS

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My Net Worthwhile® is working with clients to execute their financial plans and help them achieve their financial goals.

Emily enjoys working closely with advisors and planners to help implement clients' financial plans and reach their goals. Through exceptional customer service and attention to detail, she provides comprehensive account services, including assisting and responding to client inquiries and requests, assisting with portfolio accounting and reporting, and processing account openings and closings.

Before joining SignatureFD, Emily was a client operations specialist at the Atlanta Consulting Group, an institutional and family office investment consulting firm. Prior to that, she was an Assistant Vice-President for Raymond James in Taxable, Fixed Income Sales.

Emily holds a Bachelor of Science in Economics and Business Administration from St. Mary's College of California.