



HEATHER ROBERTSON FORTNER, MS, IACCP® CHAIR, CHIEF EXECUTIVE OFFICER

☎ 404 253 7692

📠 404 253 7693

✉ heather.fortner@signaturefd.com

My NET WORTHWHILE™ is helping people find their Net Worthwhile.

Heather is the Chief Executive Office and Chair of the Board of SignatureFD, an integrated and comprehensive wealth management firm with offices in Atlanta, Georgia and Charlotte, North Carolina, recently named to the Inc. 5000.

During her twenty-year tenure at the firm, Heather has created and executed strategies that have exponentially grown SignatureFD's AUM from \$250M to over \$7B. Her ability to combine strategic oversight in alignment with financial goals and enterprise risk mitigation has led the firm to maintain enterprise valuations, annual growth rates and client retention rates that consistently exceed industry averages. Deftly combining head and heart, Heather integrates operational excellence with strategic innovation and shepherding growth and scale in teams and organizations. Beyond operational expertise, Heather leverages her graduate degree in professional counseling to help uncover and connect people's passions and talents to build teams that deliver excellent and inspiring client experiences.

Her unwavering commitment to leading and building teams that exhibit excellence in leadership with heart has garnered her national recognition. Among these accolades, Heather has been awarded CEO of the Year by Wealth Management Magazine in 2021 and Most Admired CEO by the Atlanta Business Chronicle in 2022. In 2023, she was selected to the Leadership Atlanta Class of 2023 and named to the Titan 100 List. Heather is recognized as a

SIGNATUREFD

thought leader in the ever-changing landscape of wealth management and has been widely sought after for her expertise. Her writings have appeared in the likes of Inc.com; she has captivated audiences at large-scale speaking events, and she has been published as a reviewer of the industry book, “G2: Building the Next Generation.”

Heather deeply values service to the industry and community and has extensive board experience, including the TD Ameritrade Operations Panel (2013 – 2016), Charles Schwab’s Technology, Operations and Service Advisory Board (2018 – 2019) and the Orion Advisory Board (2012 – 2017). She currently serves on the Fidelity RIA Leader’s Council, the Goldman Sachs Advisor Solutions Panel, and as a member of the Advisory Board for Mammoth Investors.

She is a longstanding advocate of DEI initiatives both at SignatureFD and within the wealth management industry broadly. Her focus on empowering women to take on leadership positions has helped SignatureFD achieve an 80% female executive leadership team. Her belief that every person has a purpose in life, to which wealth properly aligned can help support, is the cornerstone of SignatureFD’s client promise, Net Worthwhile™.

Heather received her bachelor’s degree in Finance from Kennesaw State University and earned a master’s degree in Professional Counseling from Georgia State University. She is a graduate of the Schwab Executive Leadership Program and the G2 Leadership Institute.

Prior to her role as CEO, Heather served as Chief Compliance Officer, President, and Chief Operating Officer of SignatureFD, during which time she led the development of the operational platform and technology stack that helped fuel the firm’s double digit growth year-over-year.

Heather lives in Kennesaw with her husband and two daughters, and Oakley and Willow Grace.