



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

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Heather Robertson Fortner is the CEO and Chair of the Board of SignatureFD, an integrated wealth management firm with offices in Atlanta and Charlotte and a multi-year honoree of the Inc. 5000 list of fastest-growing private companies*. Over her two-decade tenure, she has been instrumental in scaling SignatureFD from \$250 million to nearly \$10B \$9.6 billion in total assets**, 120% growth since assuming the CEO role in 2020 alone.

Under Heather's leadership, SignatureFD has emerged as one of the industry's most purpose-driven and performance-focused firms. She brings a rare blend of strategic creativity, operational discipline, and risk-savvy execution that has fueled consistent double-digit growth, enterprise valuation expansion, and client retention rates well above industry benchmarks.

A passionate advocate for equity in financial services, Heather has redefined what inclusive leadership looks like. SignatureFD's executive team is now 78% women, an intentional reflection of her belief that diverse perspectives lead to better outcomes. Her leadership philosophy, rooted in performance, integrity, and heart, has earned national recognition*, including:

- **CEO of the Year, *Wealth Solutions Report* (2025), *Wealth Management Magazine* (2021, 2023)**
- **Allyship Champion of the Year, *InvestmentNews Women to Watch* (2024)**
- **Maverick of the Year, *Stevie Awards for Women in Business* (2024)**

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- **Most Admired CEO, *Atlanta Business Chronicle* (2022)**
- **Titan 100 Hall of Fame Inductee**

Heather has served on influential industry boards, including the TD Ameritrade Operations Panel, Goldman Sachs Advisor Solutions Panel, Charles Schwab Technology, Operations & Service Board, and Orion Advisory Board. She currently serves on the Fidelity RIA Leader's Council, Atlanta Way 2.0, and as Education Chair for the YPO Southern 7 chapter.

A thought leader in both financial strategy and human behavior, Heather holds a bachelor's degree in Finance from Kennesaw State University and a master's in Professional Counseling from Georgia State University. She is also a graduate of Leadership Atlanta, the G2 Leadership Institute, and the Schwab Executive Leadership Program.

Her insights have been featured in *Barron's*, *MarketWatch, Inc.*, and the *Atlanta Business Chronicle*, where she pens a monthly column on the why behind the what of money. In her TEDx Talk, she explores the generational impact of financial literacy, underscoring her belief that wealth should be both grown and used with purpose.

Before becoming CEO, Heather held several key executive roles at SignatureFD, including Chief Operating Officer, President, and Chief Compliance Officer, where she architected the firm's operational platform and technology infrastructure.

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

*please see [SignatureFD disclosures](#).

** total client assets, managed or unmanaged.