



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

☎ 404 253 7692
📠 404 253 7693
✉ heather.fortner@signaturefd.com

Heather Robertson Fortner is Chief Executive Officer and Chair of the Board of SignatureFD, an integrated wealth management firm serving clients nationally from offices in Atlanta and Charlotte. Over more than two decades with the firm, she has helped transform SignatureFD from a \$250 million business into a more than \$10 billion enterprise in total client assets.*

A respected chief executive known for combining strategic vision with disciplined execution, Fortner has built a reputation for scaling organizations with precision, strengthening enterprise value, and leading through complexity with unusual clarity and conviction. Under her leadership, SignatureFD has become one of the industry's most distinctive firms—recognized for sustained growth, operational rigor, strong client loyalty, and a deeply embedded culture of purpose and performance.

Fortner is widely recognized for her ability to translate values into operating systems, align culture with strategy, and build organizations designed to endure. Her leadership sits at the intersection of business performance and human insight, enabling teams to execute at a high level while remaining anchored in trust, accountability, and long-term relevance.

Her leadership has earned broad national recognition, including Georgia 100 Women of Excellence (2026), Luminaries with Heart by ThinkAdvisor (2025), CEO of the Year honors from Wealth Solutions Report (2025), ThinkAdvisor (2025), and Wealth Management Magazine (2021, 2023), InvestmentNews Hot List (2025), Allyship

SIGNATUREFD

Champion of the Year from InvestmentNews Women to Watch (2024), Maverick of the Year from the Stevie Awards for Women in Business (2024), Most Admired CEO by the Atlanta Business Chronicle (2022), and induction into the Titan 100 Hall of Fame.*

Fortner has also been a trusted voice to some of the most influential institutions in financial services. She has served on advisory boards for TD Ameritrade, Goldman Sachs Advisor Solutions, Charles Schwab, and Orion, and currently serves on the Fidelity RIA Leaders Council and the Capital Group RIA Advisory Board.

Her leadership extends beyond business into civic, educational, and philanthropic arenas. She serves on the Board of Trustees of Kennesaw State University, the Children's Healthcare of Atlanta Foundation Board, the Atlanta Police Foundation Board, and the Partnership for Inclusive Innovation Board, and is a Leadership Council Member for Zoo Atlanta. She also serves as Education Chair for the YPO Southern 7 Chapter and participates in Atlanta Way 2.0.

Fortner's perspective is shaped by an uncommon combination of financial expertise and behavioral insight. She holds a bachelor's degree in Finance from Kennesaw State University and a master's degree in Professional Counseling from Georgia State University. She is also a graduate of Leadership Atlanta, the G2 Leadership Institute, the Schwab Executive Leadership Program, and Stanford University Graduate School of Business executive education.

Her commentary and leadership insights have been featured in Barron's, MarketWatch, InvestmentNews, Inc., and the Atlanta Business Chronicle, and she is a frequent keynote speaker on leadership, growth, and the future of wealth management. In her TEDx Talk, she explores the generational impact of financial literacy and the responsibility that comes with building wealth with intention.

Before being named CEO, Fortner served in several senior executive roles at SignatureFD, including President, Chief

SIGNATUREFD

Operating Officer, and Chief Compliance Officer, helping architect the firm's operating platform, leadership infrastructure, and technology foundation.

She lives in Kennesaw, Georgia, with her husband and their two daughters.

*please see [SignatureFD disclosures](#).

** Total client assets, managed or unmanaged.