SIGNATUREFD



ISABEL F. BERBERT

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My Net Worthwhile® is to help others, and I am fueled by my desire to solve problems for my clients.

Isabel is a wealth advisor, partner, and member of the investment committee at SignatureFD. She began her career as an analyst with Morgan Stanley 2006. Before joining SignatureFD, she worked at J.P. Morgan and UBS Private Wealth Management in Atlanta. Isabel works with ultra-high-net-worth individuals, endowments, and foundations all over the U.S. In addition, she particularly enjoys working with business owners and entrepreneurs, and has substantial experience in pre and post-transaction planning. Her goal is to serve as a family's personal CFO, engaging with their trust and estate planning, tax strategy, credit solutions, banking relationships, financial planning, and investment management.

Isabel draws on her 18+ years of experience in working with clients through complex problems and enjoys collaborating with her robust network of internal and external colleagues to provide the best counsel for her clients. This usually results in helping clients maximize and take advantage of their time, which she believes is their most valuable asset.

Isabel is a trained family wealth succession planner through the Cox Family Enterprise Institute at Kennesaw State University. She graduated cum laude from the University of the South (Sewanee) and with distinction from the McIntire Business Institute at the University of Virginia. She has been an active member of Vistage for over 6 years. Isabel also serves as President and Secretary of the Sewanee Village Ventures Fund, an organization funded by her Alma Mater's endowment to provide housing, accommodations and enhance the overall enterprise value

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of Sewanee, Tennessee.

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