SIGNATUREFD

JACKIE BROE

SENIOR CLIENT CARE ASSOCIATE

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My Net Worthwhile® is to always look for the positive in every situation.

A love for numbers and developing relationships inspired Jackie to pursue a career in the financial industry. She believes the relationships we create with our clients are vital in determining their Net Worthwhile® and helping them achieve it. Jackie is a service-minded problem-solver who works to help ensure that clients receive quality service so they can focus on what matters most to them.

As a client care associate, Jackie provides comprehensive account support services, including researching and responding to client inquiries, processing account openings and closings, assisting with account distributions, and portfolio accounting and reporting.

Before joining the SignatureFD team, Jackie served for over six years as a registered client service associate and wealth strategy associate at UBS Financial Services, Inc., where she provided client management support for ultra-high net clients. She received a Bachelor of Science in Mathematics from Georgia College & State University in Milledgeville.

Jackie is a native Atlantan and an avid volunteer for organizations like the Atlanta Humane Society and Hands on Atlanta.

*Please Note: Limitations. The achievement of any professional designation, certification, degree, or license, recognition by publications, media, or other organizations, membership in any professional organization, or any amount of prior experience or success, should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results or satisfaction if SignatureFD is engaged, or continues to be engaged, to provide investment advisory services.