



JAMES E. TALLY II, CTFA, CFP®

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OF SIGNATUREHEALTH

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My NET WORTHWHILE™ is helping clients find financial peace-of-mind to take the uncertainty out of their life.

Jim has devoted his career to helping clients achieve the financial confidence they need to live a great life doing the things most important to them. By developing a financial design and investment strategy tailored to meet each client's unique desires, Jim's goal is to remove financial uncertainty from their future. He is adept at working with clients of varied backgrounds, from business owners to executives to professionals to athletes to high-net-worth families. Jim also comes from a family of healthcare industry veterans and has seen the challenges and opportunities they face financially. As a result, he works with numerous healthcare professionals and practitioners and leads our SignatureHEALTH initiative.

Jim graduated from the University of Georgia, where he was a member of the Honors Program. His career spans 25 plus years of working with clients at firms including SunTrust, Merrill Lynch and U.S. Trust. He views his position with SignatureFD as an opportunity to marry the capabilities of a large firm with the flexibility of a small one to create an ideal platform to serve his clients.

His commitment to excellence in service, objective professional advice and strict attention to detail have earned him respect and recognition within the financial community. Jim has been named in *Atlanta* magazine's Five Star Best in Client Satisfaction Wealth Managers for multiple years. He strives to stay connected to the latest the planning and investment industry has to offer and has

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earned the Certified Financial Planner designation, Certified Trust and Financial Advisor designation and is a member of the Financial Planning Association. He attended the Southern Trust School and The Canon Financial Trust School.

Jim and his family are big believers in causes related to education, healthcare and children and he is an active supporter of Children's Healthcare of Atlanta and The Atlanta Ronald McDonald House Charities. He also is a big sports fan and has coached youth baseball and basketball in the Atlanta area for years.

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