

SIGNATUREFD



JAMES P. YOST, CFP®, CAIA® PARTNER, WEALTH ADVISOR

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My NET WORTHWHILE™ is making a positive impact on the lives of others.

James has seen firsthand the magic that can happen with a successful financial planning process and enjoys bringing that magic to every client meeting. A Certified Financial Planner™ and a Chartered Alternative Investment Analyst (CAIA®) with nearly a decade of experience, James works with clients to help them optimize their wealth, so they can focus on the things in life that make them happiest.

Prior to joining SignatureFD, James served as an associate relationship manager with Balentine. During his time with Balentine, James worked with more than \$1 billion in complex private wealth. He worked with the planning team to build financial plans and risk assessments, providing clients with a thorough analysis of public market investments, hedge funds, and private capital. James graduated from the University of Georgia with a Bachelor of Business Administration in finance. Additionally, he studied abroad at the University of Oxford, with a concentration in International Business.

James is the Co-Chair of the Advisory Council for Warrick Dunn Charities, serves on the Advisory Council for LaAmistad, Inc., is a member of Midtown Atlanta Rotary Club and is the President of the Serendipity Labs Toastmasters club.