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

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My Net Worthwhile® is helping make 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™, Chartered Alternative Investment Analyst (CAIA®), and Certified Tax Specialist™ with more than 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.

Before 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 serves on the Advisory Council for Warrick Dunn Charities and the Advisory Council for LaAmistad, Inc. He is a recipient of the 2024 InvestmentNews Top Advisors Award.

James lives in Sugar Hill, Georgia, with his wife Sissy, daughter Scottie, son Wayland, two dogs, and three cats.

Certified Financial Planner Board of Standards Inc. owns

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the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™, CFP® and CFP® in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

InvestmentNews Top Advisors are selected by an independent judging panel based on an individual advisor's assets under management, AUM growth, and organic client growth introduced to the business over the last 12 months. The receipt of this award included no associated compensation and was solely based on the metrics described. 2023 winners were announced on January 29, 2024.