



## JONATHAN A. GALVIS, CAIA, CFA® DIRECTOR OF PORTFOLIO MANAGEMENT

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My NET WORTHWHILE™ is managing client portfolios to help maximize their NET WORTHWHILE™.

Jonathan's passion lies at the intersection of the capital markets and personal finance. He enjoys learning about new investments and ways to manage their impact on client portfolios. As a portfolio analyst, Jonathan aims to understand the investment difficulties of clients so that he can provide customized solutions to fit their investment profiles. He brings a consistent work ethic to the investment team where he works to implement portfolio strategies that best meet client goals. He is also responsible for assisting with research and manager due diligence.

Prior to joining SignatureFD, Jonathan worked in the technology sector where he gained expertise in operations, project management, and compliance processes. He earned his bachelor's in business administration in both Finance and Managerial Sciences from Georgia State University. Jonathan has passed all three levels of the CFA Program and may be awarded the charter upon completion of the required work experience.

Jonathan supports the Latino Community by encouraging younger kids to continue their education through mentorship programs and by directly working with the community. He is also a member of the Atlanta Society of Finance and Investment Professionals.