



## MARGARET HUANG CASEY, CFP®? PARTNER, CHIEF OPERATING OFFICER

📞 404.253.7620  
📠 404.253.7621  
✉️ margaret.casey@signaturefd.com

My Net Worthwhile® is helping others become more intentional with their time and resources so they can live a more fulfilling life.

Margaret collaborates with SignatureFD's senior leadership team to execute the firm's strategic initiatives. She has worked in the wealth management industry since 1999 in various capacities ranging from client and employee operations to advisory and investment services to executive leadership and business management.

She has served on various industry and non-profit boards, including the Financial Planning Association of Austin, the Schwab Technology, Operations & Service Advisory Board, and Breakthrough Central Texas. Margaret has been nominated multiple times for the Austin Business Journal's Profiles in Power and Austin's 40 Under 40 Mentor of the Year award in 2020. She is also the founder of Money Circle ATX, a women's initiative that provides judgment-free experiences for women to openly discuss the taboo subject of money.

Margaret is a CERTIFIED FINANCIAL PLANNER™ professional and holds an MS in Development Management from the London School of Economics and Political Science and a double BA in International Relations and East Asian Studies from Brown University.

*Certified Financial Planner Board of Standards Inc. owns 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.*

# SIGNATUREFD

\*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.