



PHILIP BEATTY, CPA, CFP®, CEPA

PARTNER, WEALTH ADVISOR

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My NET WORTHWHILE™ is providing clarity to successful people.

Philip is an entrepreneur who has started and sold several professional businesses, as well as numerous real estate ventures. He started, grew and sold a successful 15-person CPA firm. A focus of his CPA practice was helping business owners successfully exit their business including third-party sale, employee buyout, and family succession strategy. Philip transitioned to wealth management to allow him to provide a broader range of services for his clients. Philip's passion is helping other business owners maximize the social and financial benefits of their success, and he has worked with several clients for more than 30 years.

Because of his excellent business knowledge, he served on the original Boards that started both the Georgia Exit Planning Institute and The North Fulton Community Foundation. In addition, he served on the Board for the merger of Ansley Golf Club and Settindown Creek. Philip has spoken at numerous seminars on Exit Planning for both business owners and professionals.

Philip started his career in 1983 with Arthur Young ("big four" accounting firm), working with the entrepreneurial and mergers and acquisitions teams. He then started Beatty, Schival and Associates. After growing and selling Beatty, Schival and Associates, he transitioned his skills to provide Wealth Management services at PPA Advisors, an independent Registered Investment Advisory Firm. In 2013, he merged his practice with SignatureFD, where he is currently an active Partner. Philip graduated from the

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University of North Carolina – Chapel Hill as an Accounting Major.

Philip's passion outside of work is coaching youth sports. He has coached over 50 seasons and his favorite message to receive is, "Coach, can I be on your team next year?" Philip's community involvement includes Founding Board of North Fulton Rotary, a graduate of North Fulton Leadership Program, Past President of Community Foundation of North Fulton, and Treasurer of Ansley Golf Club.

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