



SAM LIPTAK

PLANNING ASSOCIATE

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My Net Worthwhile® is helping others discover and live out their unique passions in life.

Passionate about helping others live rich, fulfilling lives, Sam works with advisors to help clients on their path to financial freedom while still making the most of the present. He has studied retirement planning, estate planning, and tax planning. He had the opportunity to be a part of the VITA (voluntary income tax assistance) program at UGA to prepare tax returns pro bono for low-income families around the Athens community.

At SignatureFD, Sam's current responsibilities are to help advisors prepare for meetings with clients. This includes net worth statements, cash flow plans, meeting agendas, education analysis, and estate and tax planning reviews. Sam has a Bachelor in Financial Planning from the University of Georgia.

Sam has worked with Heart for Africa to build self-sustainable farms to fight hunger in poverty-stricken areas and Meals by Grace to make care packages of food/necessities to deliver to struggling families. He also enjoys traveling, skiing, hiking, and cheering on the UGA football team.