



SPENCER BORCHELT, CFP® SENIOR PLANNING ASSOCIATE

☎ 404.573.4810

📠 404.573.4811

✉ Spencer.borchelt@signaturefd.com

My Net Worthwhile® is working with advisors to help people learn how to steward money in a way that is a blessing to themselves and others.

Skilled at viewing financial profiles holistically and dissecting potential gaps to ensure the plan supports people's values and goals. Spencer works with clients and advisors to build and execute wealth management blueprints that help high-net-worth clients to enjoy their wealth now and in the future. His experience in comprehensive financial planning, tax projections, creating and implementing investment strategies, estate and insurance planning, cash flow exhibiting, and helping clients analyze employer benefit opportunities make him a valuable asset to the SignatureFD team.

Spencer earned his Bachelor of Business Administration in Finance from Kennesaw State University in 2018 and is a CERTIFIED FINANCIAL PLANNER™. He enjoys challenging himself with strategic board games, long-endurance ultra-marathon runs, and backpacking trips with his family in his free time. He is also an active member at Cross Point City Church.

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.