



## TONY WELCH, CFA®, CFP®, CMT

PARTNER, CHIEF INVESTMENT OFFICER

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My Net Worthwhile® is in helping clients grow and protect their assets so that they may live fully and freely.

Tony grew up in the investment industry. His father owned and operated a registered investment advisory firm, where many clients became as close as family members through the years. Through that lens, Tony was able to experience the joy of helping people reach financial goals, leaving a permanent impression on him. As Tony began his career, he discovered a passion for investments and began studying market history and portfolio construction. His curiosity has evolved into his own personal Net Worthwhile® – to live life as a constant student.

As chief investment officer, Tony chairs the firm's Investment Committee, responsible for investment strategy and diligence. He communicates investment strategy with SignatureFD clients through meetings, events, webinars, and written communications. Tony also represents the firm in professional industry events.

He has authored articles for Euromoney magazine and the Institutional Investor. Tony's work has been featured in the Wall Street Journal, Barron's, and the Financial Times. He has been a presenter at major investment conferences such as Schwab Impact and the Chartered Market Technicians Annual Symposium.

Tony joined SignatureFD in 2018 after an 11-year career at Ned Davis Research, one of the Street's most respected independent research firms. He served as the firm's emerging markets strategist before becoming the lead ETF strategist. He holds a Bachelor of Science degree in

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Finance, the Chartered Financial Analyst designation, and the Chartered Market Technician designation. He is a member of the Atlanta Society of Finance and Investment Professionals.

Tony enjoys coaching his two sons and their teammates, particularly on the baseball field. He is an active volunteer in a variety of youth sports roles. Additionally, Tony prioritizes time outdoors and is an avid runner.

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