

**LANCE STAFFORD, CFA<sup>®</sup>**

PRINCIPAL

**EDUCATION**

Bachelor of Arts, Economics  
Emory University

MBA, Finance and Accounting  
The University of Texas at Austin

CFA Charter Holder

***Lance helps to inspire clients to achieve the financial freedom that not only enhances their ability to meet financial goals, but enables them to pursue their life passions without worry.***

Guided by long-term planning principles and a deep expertise in both capital markets and retail wealth management, Lance helps clients understand how to manage finances simply and cost-effectively while navigating the complexities of investing in modern markets. In his role as Principal, Stafford advises high-net-worth individuals and families who seek effective wealth management solutions and helps empower them to live a great life. Lance also serves as a member of the SignatureWOMEN<sup>®</sup> initiative where he will continue to pursue his goal of helping women who are transitioning to financial independence as a result of divorce, the loss of a spouse, or other life events.

Prior to SignatureFD, Lance spent three years as an investment counselor with one of the world's largest asset management companies. He transitioned to wealth management after over 15 years as a leading institutional equity salesperson for several Wall Street investment banks. His long tenure provided unique insight into how assets are managed on behalf of retail investors in today's increasingly complicated capital markets environment.

**CONTACT INFO**

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