



“Our mission is to provide our clients the insight to pursue and the process to achieve the life they desire.”

EDUCATION

Bachelor of Business Administration, Accounting, University of North Carolina at Chapel Hill

PROFESSIONAL AND CIVIC AFFILIATIONS

Member and Past Treasurer, Financial Planning Association of Georgia

Member, American Institute of Certified Public Accountants Financial Planning Division

Member, Georgia Institute of Certified Public Accountants

Past President, Community Foundation of North Fulton

PHILIP C. BEATTY, CPA, CFP® PARTNER

Philip Beatty is a partner with SignatureFD. Building on a more than 30-year career in financial services, he joined the firm to expand his resources as he continues to enhance the wealth management services he provides for his clients. Philip has extensive experience working with business owners, executives and active retirees. In the process of implementing a client's life plan, he uses his skills in financial and estate planning, investment strategy and business succession planning. He takes pride in assisting his clients in making educated, thoughtful decisions well before they expect to achieve their goals, thereby increasing the chances of them living the quality of life to which they aspire.

Prior to joining SignatureFD, Philip provided wealth management services through PPA Advisory Services. He started his career in the entrepreneur services department of Arthur Young, a national CPA firm, which provided an early opportunity to work with entrepreneurs. Later, he founded his own CPA firm, Beatty, Schival and Associates, LLC, where he provided extensive hands-on advice for entrepreneurs. As he grew the company from a sole proprietorship to a firm of 12 professionals, his client relationships also grew, with people seeking more advice about their personal wealth and retirement options. As a result, Philip transitioned to providing personal wealth, estate and investment planning services for his clients.

Philip is a CERTIFIED FINANCIAL PLANNER™ professional and a Certified Public Accountant. He stays active in the community and has served on several boards, including the Financial Planning Association of Georgia, Community Foundation of North Fulton, Settindown Creek Golf Club, Ansley Golf Club, Roswell Baseball Association and Rotary Club of North Fulton.

Philip's passions have evolved from playing competitive golf to coaching youth sports. He enjoys anything his children enjoy, including snow skiing, hiking, water sports, travel and occasionally golf. Philip has lived in Atlanta since 1982 with his wife, Donna, and their children, Sarah, Matthew and Carol.

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