

GLOBAL TRUST

Preserving capital and growing wealth for individuals and families



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Alexia Varga is a Managing Partner of Global Trust Asset Management, LLC. Mrs. Varga brings more than 15 years of experience in the financial services industry to her leadership role at Global Trust. She is also a part of the advisory team of the firm. She handles all aspects of investment portfolio management and client relationship.

Mrs. Varga is also responsible for all aspects of real estate advisory, including operations, leasing, property management, renovations, capital projects and final disposition. She also participates in sourcing and underwriting real estate acquisitions.

She offers advice to a diverse group of clients including:

- High Net Worth Families
- Small Institutional Clients
- Pension Plans
- Foundations & Endowments
- Government and Non-profit Investment Planning

Areas of Expertise

- Financial Planning
- Estate & Trust Planning
- Family & Succession Planning
- Liability Management
- Managed Money Consulting
- Real Estate Advisory
- Asset Allocation Strategies
- Alternative Investments

Professional Memberships

- Member, American Institute of Certified Public Accountants
- Member, Florida Institute of Certified Public Accountants
- Member, Florida Government Finance Officers' Association (FGFOA)
- Member, Association of Certified Fraud Examiners

Education

- Palm Beach Atlantic, Bachelor of Science in Accounting
- Series 65 Securities License, Registered Investment Adviser Representative
- Certified Fraud Examiner, Association of Certified Fraud Examiners
- American Institute of Certified Public Accountants
 - Certified Public Accountant
 - Chartered Global Management Accountant