

# GLOBALTRUST

*Preserving capital and growing wealth for individuals and families*



Mr. Littky brings more than 20 years of experience in the financial services industry to his leadership role at Global Trust. He provides a holistic approach and platform in helping clients achieve their unique financial goals.

One of his many roles is helping to ensure a high quality client experience for all of the team's valued clients. He is directly responsible for coordinating the team's efforts in delivering comprehensive financial planning services and personalized investment management solutions. His ability to take ownership of each client's unique goals and objectives, and deliver transparent advice in their best interest, has made him a highly sought-after financial advisor.

Together, alongside of a client's tax, legal and consulting specialists, he creates seamless and customized wealth management strategies catering to:

- High Net Worth Families
- Professional Athletes & Entertainers
- 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
- Restricted Stock & Options
- Asset Allocation Strategies
- Alternative Investments

## Professional Memberships

- Member, Association of Professional Investment Consultants
- Member, Investment Management Consultant Association
- Member, Financial Planning Association
- Registered Financial Advisor, NFL Players Association

## Education

- BA, University of Arizona 1994

## Joseph H. Littky

**CFP®, CDFATM**

*Partner*

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