

# GLOBALTRUST

*Preserving capital and growing wealth for individuals and families.*



**Steven E. Marcus**  
*Senior Investment Officer*

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Dr. Steven E. Marcus former President and Chief Investment Officer and co-founder of Financial Security Services LLC, brings his expertise to Global Trust Asset Management LLC. He is a prominent wealth manager helping clients formulate their goals and provides concrete reasons for their investing. Clients benefit from the peace of mind that comes from knowing that he pursues their investment objectives intelligently and with ultimate care.

Steve manages the firm's equity portfolios, conducting top down research and selecting investment securities, which include stocks, exchange-traded funds (ETFs), alternative investments, options and other types of securities.

In this fast-paced investment market it is important to have a money manager that can act quickly, managing risk to prevent losses, while looking for gains in an ever changing economic environment. Steve has been successfully managing money for over 30 years. Steve's skill and experience with owning and managing a major healthcare practice and most recently a wealth management advisory firm places him in an ideal position for serving:

- Healthcare Professionals.
- High Net Worth individuals.
- Corporations.
- Pension Plans.

## Areas of Expertise

- Investment Management.
- Portfolio Strategies.
- Alternative Investments.
- Financial Planning.
- Business succession strategies.

## Education

- Brooklyn College of the City University of NY – Bachelor of Science in Biology.
- Penn State University - OD Medical – Board Certified in Pediatric Vision Care.
- Series 65 Securities License, FINRA.