GLOBAL TRUST

Preserving capital and growing wealth for individuals and families

Thomas Holt is a Co-founder of Global Trust Asset Management, LLC. Thomas brings more than 15 years of experience in the financial services industry to his leadership role at Global Trust. Thomas oversees the operations at Global Trust which include portfolio management, cash management, designing intricate investment strategies, trade client relationship management. Thomas, also being a CPA helps to bring a true wealth management approach to his clients. Here we are focusing not only on the investment impact of decisions made, but the tax, estate, and multi-generational effects of investment decisions and Investment Policy. Below are a few types of clients Thomas services:

- High Net Worth Families
- Trusts
- Corporations
- Pension Plans
- Foundations & Endowments

Thomas Holt

CPA, PFS, CGMA

Managing Partner/President

Office Phone: (561) 472-0191

Mobile Phone: (561) 386-9010

Email: th@gbltrust.com

Areas of Expertise

- Portfolio Management
- Asset Allocation Strategies
- Intricate Investment Strategies
- Estate & Trust Planning
- Family & Succession Planning
- Corp. & Family Cash Mgmt.
- Family Office Services
- Trustee Services

Professional Memberships

- Member, American Institute of Certified Public Accountants
- Member, Florida Institute of Certified Public Accountants
- Member, AICPA Personal Financial Planning

Education

- Harvard University, Degree Candidate Master of Liberal Arts, Finance Harvard University Extension School Expected 2019
- Clemson University, Master of Professional Accountancy Concentration: Federal Taxation
- Clemson University, Bachelor of Science, Accounting
- Series 65 Securities License, Registered Investment Adviser Representative