

GLOBALTRUST

Preserving capital and growing wealth for individuals and families

Serving families, businesses, estates and trusts in all things financial for several decades, Jill and Frank have been referred to as personal financial trainers. Embracing close, multi-generational relationships with their clients helps them understand the complete financial picture, inclusive of family dynamics and value-driven goals. Known by their clients for no-nonsense straight talk, Jill and Frank are passionate about educating clients, family and friends by lifting the fog of confusion surrounding investment products marketed by national sales teams, ignoring the noise prattled by reactive pundits, and guiding clients in making sound decisions, following simple prudent action plans to secure their financial independence.



P. Jill Ashley, CPA

Senior Investment Officer

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Education

- FL Southern College, Bachelor of Science in Communications - 1984
- FL Southern College, Bachelor of Arts in Accounting/Business-1990
- Certified Public Accountant, FL - 1992
- Series 65 Securities License, NASAA - 1998
- Executive Education Certificate, Wharton Business School - 2007

Background:

Gleaning skills from a diverse background ranging from commercial real estate leasing and development, professional advertising, financial writing, business consulting on operational efficiencies, as well as tax, accounting, asset management and trustee services, Jill's honed organizational, analytical, and listening skills led her to adopt her mantra:

"When your goals are clear, your decisions are easy."

Jill insists at times her most valuable service is keeping clients on track toward meeting their goals, and preventing them from derailing their plans.

Frank M. Ashley, III

CPA/PFS

Senior Investment Officer

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Education

- University of South Florida, Bachelor of Science in Business Administration - 1977
- Certified Public Accountant, FL - 1982
- Personal Financial Specialist (PFS) designation, AICPA - 1992
- Series 2 Securities License, FINRA - 1994

Background:

Having trained on a nuclear submarine in the U.S. Navy's Atlantic Fleet in the early 1970's, Frank understands the importance of discipline, a strong sense of direction, and collaborative efforts in reaching one's target.

He continuously instills that predisposition in helping clients and friends sort through all areas of their financial lives. Frank's famous rhetorical question: "If you don't know where you're going, how will you know if you get there?"

Branch offices:

1562 Island Cove Rd, Ft Pierce, FL
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