GLOBAL TRUST

Preserving capital and growing wealth for individuals and families

Thomas Holt

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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, securities trading and client relationship management. Thomas, also being a CPA helps to bring a true wealth management approach to his clients. Here Thomas focuses 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

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 Designations, Memberships & Awards

- Member, American Institute of Certified Public Accountants
- Member, Florida Institute of Certified Public Accountants (CPA)
- Member, AICPA Personal Financial Planning (PFS)
- Series 65 Securities License
- Harvard University Dean's List Academic Achievement Award

Education

- Harvard University, Master of Liberal Arts in Finance, Harvard University Extension School (ALM)
- Clemson University, Master of Professional Accountancy Concentration: Federal Taxation (MPAcc)
- Clemson University, Bachelor of Science, Accounting (BS)
- Harvard University, Graduate Certificate: Corporate Finance