



NOWLEN, HOLT & MINER, P.A.

CERTIFIED PUBLIC ACCOUNTANTS



Thomas Holt, CPA, PFS, CGMA

Thomas Holt is in the Wealth Management division focusing in financial planning, taxation, and business services. Thomas has over 10 years of experience with Nowlen, Holt & Miner, P.A. He specializes in planning for individuals', families, and businesses in areas of estate and trust planning, investment, tax, insurance, and retirement needs. These areas of expertise include planning and consulting in tax compliance, tax and investment research, portfolio investment operations to support NH&M in areas of Family Office structure and operations.

Thomas has a special role at NH&M related to personal financial planning because he is also the President and Managing Partner of our affiliated Registered Investment Advisory firm, Global Trust. Here Thomas Co-founded this entity and oversees junior advisors. At Global Trust, Thomas focuses on portfolio management, client cashing needs, designing intricate investment strategies, trade processing and client relationships. This helps support NH&M's family office needs.

Industries Served

- Closely-held Businesses
- Residential Rentals
- Individuals
- High Net Worth Individuals
- Family structures
- Entrepreneurs
- Defined Contribution & Benefit Plans
- Government and Non-profit Investment Planning

Areas of Expertise

- Tax Services
- Estate Planning
- Business Advisory
- Consulting Services
- Wealth Management
- Portfolio Management
- Retirement Planning
- Insurance Planning
- Financial Statement Analysis
- Trust Services
- Family Office Support
- Personal Holding Corporations
- Investment Management
- Private Foundations

Professional Memberships

American Institute of Certified Public Accountants

Florida Institute of Certified Public Accountants

AICPA Personal Financial Planning

Education

Clemson University, Bachelor of Science Accounting

Clemson University, Master of Professional Accountancy with a Focus in Taxation

Certified Public Accountant, American Institute of Certified Public Accountants

Personal Financial Specialist, American Institute of Certified Public Accountants

Chartered Global Management Accountant, American Institute of Certified Public Accountants

Series 65 Securities License, FINRA

Providing our clients the highest quality of independent and personalized service to support their goals.