



Private Wealth Management | Family Office
Tax Strategy | Business Owner Exit Planning | Divorce Consulting

Ashley L. Madden

CFP®, CPA, CEPA

Director of Financial Planning Services, GenCrest Capital Partners

Ashley is the Director of Financial Planning Services and a Certified Exit Planning Advisor (CEPA) at GenCrest Capital Partners, a multi-client family office, managing and overseeing the wealth of high-net-worth individuals and families. Ashley brings over 20 years of financial services experience, including investment management, direct participation programs, income tax strategies, insurance planning, cash flow management, estate planning, and charitable giving.

Ashley fosters a comprehensive, individualized, and multi-faceted approach to various specialized areas of expertise, including business value acceleration, divorce planning, real estate investment, and foreign asset ownership.

Ashley also oversees the tax planning and return preparation services for firm clients. Tax planning services include strategic, customized recommendations to help maximize income and minimize taxes based on the client's current financial facts and circumstances and their long-term goals and income projections. Additionally, she coordinates with other key team members to offer tax and financial planning expertise related to business owner strategies, divorce situations, and customized investment management objectives.

Professional Certifications and Registrations

- CEPA: Certified Exit Planning Advisor, Exit Planning Institute, 2023
 - Series 22 Registered: Direct Participation Programs Representative, Financial Industry Regulatory Authority (FINRA), 2020
 - Investment Advisor Representative, Strategic Blueprint LLC, 2018
 - CPA: Certified Public Accountant, 2015
 - CFP®: CERTIFIED FINANCIAL PLANNER™, College for Financial Planning, 2008
 - Series 63 Registered: Uniform Securities Agent, Financial Industry Regulatory Authority (FINRA), 2005
 - North Carolina Insurance Licenses for Health, Life, and Long-Term Care
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Education

- Masters of Science in Accounting, Accounting, 2013
University of North Carolina at Greensboro
Beta Alpha Psi Honor Society
- Masters of Arts, Psychology, 2000
University of North Carolina Wilmington
- Bachelor of Arts, Psychology, 1996
University of North Carolina at Greensboro
Magna Cum Laude

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CAPITAL PARTNERS



continued

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Professional Memberships

- Greensboro Estate Planning Council, Director at Large, 2023-present
- NCACPA, Member, 2013-present
- Society of Financial Service Professionals (SFSP), Member, 2006-present
Board Member/Director, 2022-present

Nonprofit Leadership

- Community Foundation of Greater Greensboro, Board member, 2022-present
Professional Advisory Committee
Women 2 Women Conference, Board Member
- Women's Professional Forum (WPF), Member, 2006-present
President, 2021
Board Member, 2015-2022
- Action Greensboro, Campus Greensboro Mentor, 2017-2019, 2023
- Greensboro Downtown Parks
Treasurer, 2018-2021
Board Member, 2017-2022

Published Work & Public Speaking

- *"Are you nearing retirement? Here's how to transition your portfolio from growth to income."*
Expert Interview, www.MarketWatch.com
March 7, 2023
- *"Wi\$e Women: Empowering Yourself Towards Financial Success."*
Presenter, Community Foundation of Greater Greensboro, NC
March 2023
- *"Qualified Opportunity Zone Investing."*
Presenter, Greensboro Estate Planning Council
September 2020

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