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 25 years of financial services experience, including investment management, direct participation programs, income tax strategies, business planning, 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

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

Education

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

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GENCREST
CAPITAL PARTNERS

continued

Ashley L. Madden

CFP®, CPA, CEPA

Professional Memberships

- Certified Financial Planner, Member 2008-present
- North Carolina Association of CPAs, Member, 2013-present
- Exit Planning Institute, Member, 2023-present
- Greensboro Estate Planning Council, Director at Large, 2023-2026, Treasurer 2026-2027

Nonprofit Leadership

- Women's Professional Forum (WPF), Member, 2006-present
  President, 2021
  Board Member, 2015-2022
- Community Foundation of Greater Greensboro, Board Member, 2022-present
  Professional Advisory Committee, Member 2022-present, Chair 2024-present
  Women 2 Women Conference, Board Member, 2022-present
- Greensboro Bound Literary Orgnaization, Board Member, 2026-present

Published Work & Public Speaking

- *"Looking Under the Hood: Tax Planning Updates and Strategies for Divorcing Clients"*
  Presenter, American Association of Matrimonial Lawyers
  March 24, 2026
- *"Business Owner Roundtable Series: Being Prepared for Your Optimal Exit, Whenever That May Be"*
  Creator, Moderator, Presenter
  2025
- *"Money Mindset Makeover"*
  Podcast Interview, More And Less Podcast with Allison Moore
  October 13, 2025
- *"Building a Valuable Business: Whether You're Planning to Exit or Not"*
  Journey Alliance Panel
  April 5, 2024
- *"Are you nearing retirement? Here's How to Transition Your Portfolio from Growth to Income."*
  Expert Interview, www.MarketWatch.com
  March 7, 2023

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