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ASHLEY L. MADDEN

CPA, CFP®



POSITION AND EXPERIENCE

Director of Financial Planning Services at Hutchinson Family Offices, a multi-client family office managing and overseeing high net-worth family's wealth. Over 20 years of financial services experience including investment management, direct participation programs, income tax strategies, cash flow management, estate planning and charitable giving.

Fostering a comprehensive, individualized and multi-faceted approach to more specialized areas of expertise including small business owner strategies, real estate holdings, foreign asset ownership and Social Security maximization. In addition to investment management, Ashley also oversees the tax planning and return preparation services for firm clients. Provides strategic, customized recommendations to maximize income and minimize income taxation based on the client's current financial facts and circumstances as well as their long-term goals and income projections. Additionally, coordinates with other key team members to offer tax and financial planning expertise as it relates to divorce wealth strategies and customized investment management objectives.

PROFESSIONAL CERTIFICATIONS AND REGISTRATIONS

- CPA: Certified Public Accountant, 2015
- CFP®: CERTIFIED FINANCIAL PLANNER™ professional, College for Financial Planning, 2008
- 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

EDUCATION

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

PROFESSIONAL ORGANIZATIONS

- Member of NCACPA since 2013
- Member of Society of Financial Service Professionals (SFSP) since 2006 - Board Member/Director 2022 - Present
- Member of Women's Professional Forum since 2006, Board Member 2015-2022, President (2021)
- Greensboro Downtown Parks, Inc. - Board Member since 2016, Treasurer 2016-2020