

# Marshall Allen, CFP®, CTFA

## Trust Officer

### Advocacy Trust LLC



Marshall Allen joined Advocacy Trust in 2018 as a Trust Officer, responsible for managing trust clients, and brings a wealth of knowledge and experience to our team.

Marshall graduated cum laude from Campbell University in 2010 where he earned his undergraduate BBA degree in Trust & Wealth Management with a minor in financial planning. In addition, he received his MBA from Palm Beach Atlantic University in West Palm Beach, Florida in 2014. He holds the industry designations Certified Financial Planner™ and Certified Trust & Financial Advisor.

Prior to joining Advocacy, Marshall worked as a District Manager with an insurance company in Jacksonville, Florida. Before entering the insurance world, Marshall worked with a large national bank in North Carolina as a Trust Administrator and eventually relocated to Palm Beach, Florida to work in relationship services for the firm's ultra-high net worth business.

Marshall and his wife, Erika, have two daughters, Kennedy and Charlotte, and a third daughter on the way, Emmaline Kate. They have made their home in Mooresville, NC, where they enjoy spending time outdoors and are active in their local church. In his free time, Marshall also enjoys sports, working out, and cooking.



#### Contact

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#### About Advocacy Trust LLC

The professionals of Advocacy Trust (AT) specialize in the fields of settlement planning, litigation support, special needs trusts, and settlement administration. To learn more about AT's personalized service and trust administration, visit [advocacytrust.com](http://advocacytrust.com) or call 855-879-3436.