

CapTrust Welcomes Kevin Schmid Investment Consulting Associate, Institutional Investments

Former New Yorker Kevin Schmid has joined CapTrust Advisors as an investment consulting associate. Kevin will work with institutional investment clients and as an experienced Chartered Alternative Investment Analyst (CAIA), he will assist the CapTrust Investment Research Committee with alternative investment analysis and strategies. Kevin is based in the firm's headquarter location in Tampa, Florida.

Kevin Schmid, CFA, CAIA INVESTMENT CONSULTING ASSOCIATE



Kevin Schmid has more than 10 years of experience serving a broad institutional client base. Prior to joining CapTrust, Kevin served as a director at Highmount Capital, a boutique investment and wealth management firm based in New York, New York. At Highmount Capital, Kevin was responsible for investment manager research supporting the firm's "Open Architecture" program and was a manager for the Highmount Matterhorn Fund. He also served on the firm's asset allocation committee.

Earlier in his career, Kevin spent seven years with Aon Investment Consulting serving the institutional marketplace. At Aon, his responsibilities included investment policy development, asset allocation analysis, investment manager research and portfolio performance evaluation.

Kevin received his undergraduate degree in Economics and Psychology from Duke University and his MBA from the Fuqua School of Business at Duke, receiving the honor of being named a Fuqua Scholar. He earned the Chartered Financial Analyst (CFA) and Chartered Alternative Investment Analysts (CAIA) designations and is a member of the CFA Institute, the CAIA Association, and the New York Society of Securities Analysts (NYSSA).

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