

Jeb Graham of CapTrust discusses Fiduciary Best Practices on panel at Department of Labor “DOL Speaks” Conference

Washington D.C. – (September, 2009): Jeb Graham participated in the Department of Labor “DOL Speaks” conference in Washington, D.C. on Sept 14-15, 2009 as a panelist, speaking on the topic of “Best Practices for Fiduciary Governance”. Graham, a retirement plan industry veteran, is an institutional investment consultant with Tampa-based CapTrust Advisors, providing services for plan sponsors in both public and private sectors, in addition to non-profit organizations, colleges and universities.

This conference was exclusively focused on the Employee Retirement Income Security Act (ERISA) Title I issues presented by Department of Labor (DOL) senior representatives and private sector ERISA experts. The sessions covered a range of fiduciary topics, with regulatory interpretation from the DOL and practical insight provided by consultants and attorneys.

Graham covered several key topics in his panel, providing an overview of the process he uses in conducting a fee analysis, as well as the key points in review of an investment policy. Another important point of discussion among the three panelists was due diligence in selection of providers. The panelists commented on the importance of getting an “apples to apples” comparison of services, understanding revenue sharing payments, and avoiding conflicts of interest, as fiduciaries work through the provider evaluation process.

For more information, contact Jeb Graham direct at 813-218-5008 or via email: jeb.graham@captrustadv.com.

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About Jeb Graham:

Graham, a respected consultant in the retirement plans industry, is frequently quoted as an industry professional. He has written articles for or been featured in numerous industry publications, and is regularly invited to speak at national conferences on investment issues related to retirement plans. Graham is past Chair of the American Society of Pension Professionals and Actuaries (ASPPA) Govt. Affairs – Investment Regulations Committee, and is a former member of the Securities Industry Association’s Savings/Retirement Committee. Locally, Graham is a former board member of the Florida West Coast Employee Benefits Council.

About CapTrust:

CapTrust Advisors, LLC, one of the largest independent advisory firms in the Southeast, is headquartered in Tampa, Florida, with offices in Miami and Naples, Florida. Established in 1998, CapTrust provides institutional investment consulting services for public / private retirement plans, family office services, nonprofits, endowments and foundations. The firm is 100% employee owned. To find out more about CapTrust Advisors, LLC, please visit www.CapTrustAdv.com.