



**ERIC W. BAILEY, CFA**  
MANAGING PRINCIPAL  
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A founding Principal of CapTrust, Eric has undergone three years of advanced study in the complex issues of investment management and has earned the right to use the Chartered Financial Analyst® designation. He is a native of Tampa and received a degree, *summa cum laude* in Finance and Accounting, from the University of South Florida.

Eric has been a guest on CNBC and Fox Business News addressing various aspects of the financial markets and investment strategies. He has been quoted in a variety of national and international publications such as *The Wall Street Journal*, *U.S. News & World Report*, *The Chronicle of Philanthropy*, *Investment News*, *The Miami Herald*, *The Tampa Tribune*, *St. Petersburg Times* and the United Kingdom's *Fund Strategy* "Quarterly Review." Eric also writes for the "Investment Corner" column of the national publication, *401(k) Advisor*, by Aspen Publishers.

Eric remains active in the community through leadership and mentoring. He is a graduate of the USF College of Business Leadership program, Leadership Tampa 04, and has received recognition for his on-going involvement in the USF Corporate Mentor Program. He served as chair of the 2010 Cabinet for Leadership Tampa Alumni Association and was on the Board of Directors for the Greater Tampa Chamber of Commerce. Eric also served as chair of the 2010 Board of Directors of the CEO Council of Tampa Bay. Additionally, he is on the Board of Directors and serves as vice chair on the Community and Partnership Development Committee as well as the Finance and Investment Committee for the United Way of Tampa Bay.

Keeping current on important industry trends, Eric is involved with many professional organizations including: the Florida West Coast Employee Benefits Council, American Society of Pension Professionals & Actuaries (ASPPA®), CFA Institute and served as past president of CFA Tampa Bay. Eric has completed the PLANSPONSOR Retirement Professional (PRP) program offered through the PLANSPONSOR Institute.

PROFESSIONAL DESIGNATIONS

Chartered Financial Analyst® (CFA)

YEARS EXPERIENCE

19 +

EDUCATION

Bachelor's degree, *summa cum laude* in Finance and Accounting, from the University of South Florida

ORGANIZATIONS

USF School of Accountancy  
Advisory Council

Leadership Collaborative Tampa  
Bay, 2011

Leadership Tampa Alumni  
Association

CEO Council of Tampa Bay

Florida West Coast Employee  
Benefits Council

American Society of Pension  
Professionals & Actuaries  
(ASPPA®)

CFA Tampa Bay

United Way of Tampa Bay

SPECIALIZES IN

Institutional investment  
consulting and retirement plans