



**JAMES E. (JEB) GRAHAM, CEBS, CIMA®,
AIF®**

RETIREMENT PLAN CONSULTANT
PARTNER
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Since joining CapTrust in January 2005, Jeb has focused on providing institutional investment consulting services to committees of private sector retirement plans and non-profits. Prior to joining CapTrust, Jeb spent 12 years with Raymond James Financial, serving as national director, Retirement Plan Consulting Group

(RPCG) in the St. Petersburg, FL, international corporate headquarters.

Jeb earned his bachelor's degree in Finance from the University of Central Florida and his MBA from the University of Tampa. He completed the Certified Investment Management Analyst® (CIMA®) program offered by the Investment Management Consultants Association (IMCA) at the University of Pennsylvania, Wharton School of Business. Jeb also carries the designation of Certified Employee Benefits Specialist (CEBS), through the International Foundation of Employee Benefits in conjunction with Wharton. He received formal training in investment fiduciary responsibility from the Center for Fiduciary Studies, associated with the Katz Graduate School of Business at the University of Pittsburgh to earn designation as an Accredited Investment Fiduciary®.

Jeb has written articles featured in numerous industry publications and is regularly invited to speak at national conferences on investment issues related to retirement plans. Jeb is past chair of the American Society of Pension Professionals & Actuaries (ASPPA®) Government Affairs – Investment Regulations Committee and is a former member of the Securities Industry Association's (SIA) Retirement and Savings Committee. Jeb is a former board member of the Florida West Coast Employee Benefits Council.

PROFESSIONAL DESIGNATIONS

Certified Employee Benefits Specialist (CEBS)

Certified Investment Management Analyst® (CIMA®)

Accredited Investment Fiduciary® (AIF®)

PLANSPONSOR Retirement Professional (PRP)

YEARS EXPERIENCE

25+

EDUCATION

Master of Business Administration from the University of Tampa

Bachelor of Science in Finance from the University of Central Florida

ORGANIZATIONS

The American Society of Pension Professionals & Actuaries (ASPPA®)

Investment Management Consultants Association (IMCA)

SPECIALIZES IN

Delivering investment consulting and fiduciary services to retirement plan committees of private sector, non-profit and higher education organizations