



**SAMUEL "BO" L. PERRY, JR., CFP®**  
SENIOR INVESTMENT CONSULTANT  
PARTNER  
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Bo is a founding principal of CapTrust and has extensive experience in the financial services industry focusing on providing investment consulting for foundations and endowments, and individuals. Over his many years in the industry, he has worked in a variety of capacities including: manager in the tax division of Arthur Andersen, manager of the Florida Trust and Private

Banking Divisions of Bank of America and investment consultant with a New York City-based institutional investment management and research firm, Sanford C. Bernstein, now Alliance Bernstein.

He earned an MBA in Finance from the University of North Carolina at Chapel Hill and has an undergraduate degree from Stetson University in Deland, Florida. He was a founding board member of the Tampa Bay Business Committee for the Arts, was on the Board of the Tampa General Hospital Foundation, and is a graduate of Leadership Tampa. He has participated in the Professional Advisory Committee of the Moffitt Cancer Center Foundation, is currently on the Board of Directors of the John and Mable Ringling Museum of Art, the Stetson University Alumni Board of Directors, and was formerly on the Advisory Committee of the All Children's Hospital Foundation. Bo also sat on the Public Employee Optional Retirement Program Advisory Council in Tallahassee and has served as president of the Exchange Club of Tampa.

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PROFESSIONAL DESIGNATIONS

CERTIFIED FINANCIAL PLANNER™  
(CFP®)

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YEARS EXPERIENCE

26+

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EDUCATION

Master of Business Administration  
in Finance from the University of  
North Carolina at Chapel Hill

Bachelor of Business  
Administration from Stetson  
University

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SPECIALIZES IN

Foundations and endowments, and  
individuals