



ROBERT F. PICCIRILLI
INVESTMENT CONSULTANT
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Robert's primary focus is on creating investment strategies for CapTrust's institutional clients. With over fourteen years of industry experience, Robert has developed the necessary skills and experience to research and analyze data that is essential to investment performance.

Prior to joining CapTrust, Robert was a Private Investment Management (PIM) portfolio manager with the Tampa branch of Wachovia Securities for seven years, and he was with UBS PaineWebber's Private Client Group for three years. Building upon his experience as a PIM portfolio manager, Robert incorporates custom planning into the investment process.

Robert incorporates the use of simulations to appropriately define achievable goals and objectives for clients. He combines his experience with the knowledge and experience of CapTrust's Investment Research Committee to recommend allocations to asset classes and investment managers. The complete process is designed to preserve and build the client's wealth in a manner consistent with their goals and objectives.

Robert is a native of Florida. He graduated with a B.S. in Finance from the University of South Florida, and he holds several industry registrations and licenses.

YEARS EXPERIENCE

14+

EDUCATION

Bachelor of Science in Finance
from the University of South
Florida

SPECIALIZES IN

Investment strategies for
institutional clients