



GARY W. QUEEN
INVESTMENT CONSULTANT
PARTNER
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Gary has thirty-six years investment experience in working with institutional clients and wealthy families. He has served in leadership roles in investment management, private banking, securities and trust services industries throughout his career. His investment experience encompasses value equities, growth equities, small cap stocks, convertibles,

taxable & tax preferred fixed income, and insurance contracts.

At CapTrust, Gary is an Investment Consultant and head of our Southwest Florida office located in Bonita Springs on the Gulf Coast between Ft. Myers and Naples.

Gary joined CapTrust from Private Capital Management, an All Cap Value equity manager in Naples, Florida. As managing director & portfolio advisor, he was in charge of their Client Service Team. Gary was also the primary contact for many investment consulting firms that recommended his firm to their clients. Under his leadership, the firm's assets under advisement grew from \$5 billion to \$32 billion in five years from 2000 through 2005.

Originally from the Midwest, Gary worked in Michigan and Ohio for a large national trust company and four regional banks from 1971 through 1999. All five of his former bank employers have been acquired by larger organizations. Some of his previous job titles include senior trust officer, SVP of institutional trust, senior managing director of capital management and president & chairman of affiliated Registered Investment Advisors.

Gary is a graduate of Wayne State University with an MBA in Finance and Eastern Michigan University with a BBA in Management. He also is a graduate of the ABA Trust School at Northwestern University. Previously, Gary was treasurer & board member of the Greater Estero Cultural Arts Council in Estero, FL and Finance Chair for the parish St. Joan of Arc Catholic Church in Chagrin Falls, OH. Gary is a member of the CFA Institute, immediate past president and board member for the CFA Society of Naples.

YEARS EXPERIENCE

36 +

EDUCATION

Master of Business Administration in Finance from Wayne State University

Bachelor of Business Administration in Management from Eastern Michigan University

Graduate of the ABA Trust School at Northwestern University

ORGANIZATIONS

CFA Institute

CFA Society of Naples – Immediate past President & Board Member

NCH Healthcare – Investment Committee

SPECIALIZES IN

Institutional clients and wealthy families