



JAMES J. WATERS, FSPA, CPC, EA
SENIOR INVESTMENT CONSULTANT
PARTNER
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For more than forty-one years, Jim has provided consulting expertise to all aspects of the creation, funding, portfolio management and administration of qualified retirement plans and executive compensation arrangements. He has personally worked with over 1,000 employers ranging up to 50,000 employees.

In 1975, Jim founded Ogle & Waters, Inc. which, at one point, was the largest pension consulting firm headquartered in the state of Florida. In 1991, Ogle & Waters was purchased by Aon Consulting, an international benefits consulting firm. He continued his career with Aon as a senior vice president and actuary. Prior to joining CapTrust in 1999, Jim also owned Waters Pension Advisors, Inc. (WPA).

Jim earned a BA in Economics from North Carolina State University and an MBA from the University of Florida. His current and former professional affiliations include Fellow, Society of Pension Actuaries (FSPA) with the American Society of Pension Professionals & Actuaries, Member of the American Academy of Actuaries, Certified Pension Consultant, and Enrolled Actuary. Jim recently completed the PLANSPONSOR Retirement Professional (PRP) program offered through the PLANSPONSOR Institute.

During his career, Jim was a pioneer in the establishment in 401(k) plans and “open architecture” participant record keeping arrangements. He has also developed defined benefit plan actuarial valuation and defined contribution plan participant recordkeeping software systems. Two of his books have been published by the American Society of Pension Professionals & Actuaries and he is also a frequent speaker at national, professional conferences.

PROFESSIONAL DESIGNATIONS

Fellow, Society of Pension Actuaries (FSPA)

Certified Pension Consultant (CPC)

Enrolled Actuary (EA)

PLANSPONSOR Retirement Professional (PRP)

YEARS EXPERIENCE

41+

EDUCATION

Master of Business Administration from the University of Florida

Bachelor of Arts in Economics from North Carolina State University

SPECIALIZES IN

Retirement plans and executive compensation arrangements