



Wednesday, October 6, 2021

Robert Miller Joins CAPTRUST as Chief Financial Officer

Firm Also Adds Marc Hermer as Director of Portfolio Trading and Implementation

Raleigh, N.C. – October 6, 2021 – CAPTRUST Financial Advisors (CAPTRUST) today announced the appointment of [Robert Miller](#) to the role of chief financial officer (CFO). The firm today also announced that [Marc Hermer, CFA](#), has joined the firm in the newly created role of director of portfolio trading and implementation. Both executives are based at CAPTRUST’s headquarters in [Raleigh, NC](#).

As CFO, Robert oversees the company’s financials, including all reporting, budgeting, allocation, and financial analysis. As part of CAPTRUST’s leadership team, Robert executes the firm’s strategic direction by implementing key initiatives, allocating resources, and evaluating potential acquisitions to align with the firm’s mission and broader strategy.

Prior to joining the firm, Robert spent 17 years at Raymond James Financial in Tampa, FL. Most recently, he served as chief operating officer and chief financial officer for the Global Equities and Investment Banking Division of Raymond James & Associates. He also held the role of chairman and president of Raymond James International Holdings, where he managed the majority of Raymond James’s joint ventures and international operations—ranging from developed markets, including the UK and France, to emerging markets, including Argentina, Brazil, Turkey, and India.

Robert held several positions with American Express before Raymond James, including director of institutional risk analysis. Robert holds a Bachelor of Arts degree in economics and political science from the University of North Carolina at Chapel Hill and a Master of Business Administration degree from the Wharton School of Business, University of Pennsylvania.

Marc Hermer serves as a director of portfolio trading and implementation within CAPTRUST’s Investment Group. He leads the investment and trading teams in all trade generation and execution processes, data management, and portfolio management functions.

Prior to joining the firm, Marc led the overlay investment strategy team at Merrill Lynch, supporting the

management and implementation of over \$500 billion of AUM across 600 model portfolios. He was the primary architect of Merrill's centralized wealth portfolio management platform and was responsible for developing new investment strategies and writing rebalancing algorithms. Marc holds a Bachelor of Arts degree in economics from Dartmouth College.

"We are pleased to add these two highly qualified individuals to our leadership team at CAPTRUST," said Ben Goldstein, president at CAPTRUST. "Both Robert and Marc have a strong history in the financial services industry and will help us to deliver on our promise to provide service beyond expectation."

About CAPTRUST

Founded in 1997 in [Raleigh, North Carolina](#), CAPTRUST is an independent registered investment advisor. The firm provides investment management, financial planning, estate planning, and tax advisory and compliance for individuals and families. For retirement plan sponsors, endowments, foundations, and religious entities, CAPTRUST offers investment advisory services, fiduciary support, plan design, provider analysis/fee benchmarking, and employee advice programs. With more than 900 employees across 60 locations nationwide, CAPTRUST oversees more than \$70 billion in assets under management and more than \$630 billion in assets under advisement (as of June 30, 2021).

Author(s)



Robert Miller

<https://www.captrust.com/people/robert-miller/>



Marc Hermer, CFA®

<https://www.captrust.com/people/marc-hermer-cfa/>

Legal Notice

This document is intended to be informational only. CAPTRUST does not render legal, accounting, or tax advice. Please consult the appropriate legal, accounting, or tax advisor if you require such advice. The opinions expressed in this report are subject to change without notice. This material has been prepared or is distributed solely for informational purposes and is not a solicitation or an offer to buy any security or instrument or to participate in any trading strategy. The information and statistics in this report are from sources believed to be reliable but are not guaranteed by CAPTRUST Financial Advisors to be accurate or complete. All publication rights reserved. None of the material in this publication may be reproduced in any form without the express written permission of CAPTRUST: 919.870.6822.

© 2021 CAPTRUST Financial Advisors