



Bio - Eric J. Freedman

Chief Investment Officer, Head of Consulting Research Group

Eric is CAPTRUST's Chief Investment Officer and serves as a member the firm's Executive Committee. As Head of the Consulting Research Group, he is charged with asset allocation research and tactical decision making, as well as directing the firm's investment vehicle and manager selection efforts. He also oversees all investment research and analysis within the qualified and nonqualified defined contribution market.

Prior to joining CAPTRUST in 2006, Eric served as a Senior Portfolio Manager for Franklin Street Partners, as well as Vice President of the Goldman Sachs Group within the company's Equity Derivatives and International Equities businesses. He graduated magna cum laude with a Bachelor of Arts degree in Economics from Colgate University, where he was captain of the Lacrosse team. He received a MBA in Finance and Management from the Wharton School of the University of Pennsylvania, and holds the FINRA Series 3, 7, 24, 63 and 65 licenses.

ECONOMIC UPDATE OUTLINE

- Current macroeconomic update and events:
 - U.S. budget deficit
 - European sovereign debt
 - The Chinese slowdown
 - Other contemporary issues
- Theory behind the capital markets and the practical investor perspective.
- Asset classes
 - Global stocks
 - Bonds and commodities
 - Hedge funds
 - Real estate
- Quantitative and qualitative analysis of current issues to assess the present and consider the future.
 - Price movements
 - Valuation
 - Capital flows
 - Investor sentiment