

Rick Shoff

As Managing Director of the Advisor Support Group, Rick focuses on the firm's business development, advisor support, and advisor recruiting and acquisition initiatives. He also serves as a member of our firm's Executive Committee. Prior to joining CAPTRUST in 2006, Rick founded Plan Advisory Services and built the company into one of the most well-respected advisory firms in the nation and has worked in the industry since 1983. Rick earned a Bachelor of Science degree in business administration from Lebanon Valley College and holds the Certified Merger & Acquisition Advisor (CM&AA) designation.

Experience

- Managing Director, Advisor Support Group Managing Director, Advisor Support Group
CAPTRUST Jan 2006 - Present · 18 yrs. 3 mos. Jan 2006 - Present · 18 yrs. 3 mos. Greater
Philadelphia Area Greater Philadelphia Area
- Founder and Chief Executive Officer Founder and Chief Executive Officer
Plan Advisory Services, Inc. Plan Advisory Services, Inc. Jan 1991 - Dec 2006 · 16 yrs. Jan 1991 -
Dec 2006 · 16 years Greater Philadelphia Area Greater Philadelphia Area
- Account Executive Account Executive
Noble Lowndes Noble Lowndes 1989 - 1991 · 2 yrs 1989 - 1991 · 2 yrs. Greater Philadelphia Area

Licenses & certifications

- Accredited Investment Fiduciary Accredited Investment Fiduciary
- Certified Merger and Acquisition Advisor

Education

[Lebanon Valley College Lebanon Valley College](#)
[Bachelor of Science \(B.S.\), Business Administration Bachelor of Science \(B.S.\), Business](#)
[Administration 1979 - 1983 1979 - 1983](#)

- Activities and societies: Varsity Football and Lacrosse