



IAPD Report

MATTHEW MICHAEL MYERS

CRD# 2506930

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When communicating online or investing with any professional, make sure you know who you're dealing with. [Imposters](#) might link to sites like BrokerCheck from [phishing](#) or similar scam websites, or through [social media](#), trying to steal your personal information or your money.

Please contact FINRA with any concerns.



IAPD Information About Representatives

IAPD offers information on all current-and many former representatives. Investors are strongly encouraged to use IAPD to check the background of representatives before deciding to conduct, or continue to conduct, business with them.

What is included in a IAPD report?

IAPD reports for individual representatives include information such as employment history, professional qualifications, disciplinary actions, criminal convictions, civil judgments and arbitration awards.

It is important to note that the information contained in an IAPD report may include pending actions or allegations that may be contested, unresolved or unproven. In the end, these actions or allegations may be resolved in favor of the representative, or concluded through a negotiated settlement with no admission or finding of wrongdoing.

Where did this information come from?

The information contained in IAPD comes from the Investment Adviser Registration Depository (IARD) and FINRA's Central Registration Depository, or CRD, (see more on CRD below) and is a combination of:

- information the states require representatives and firms to submit as part of the registration and licensing process, and
- information that state regulators report regarding disciplinary actions or allegations against representatives.

How current is this information?

Generally, representatives are required to update their professional and disciplinary information in IARD within 30 days.

Need help interpreting this report?

For help understanding how to read this report, please consult NASAA's IAPD Tips page <http://www.nasaa.org/IAPD/IARReports.cfm>

What if I want to check the background of an Individual Broker or Brokerage Firm?

To check the background of an Individual Broker or Brokerage firm, you can search for the firm or individual in IAPD. If your search is successful, click on the link provided to view the available licensing and registration information in FINRA's BrokerCheck website.

Are there other resources I can use to check the background of investment professionals?

It is recommended that you learn as much as possible about an individual representative or Investment Adviser firm before deciding to work with them. Your state securities regulator can help you research individuals and certain firms doing business in your state. The contact information for state securities regulators can be found on the website of the North American Securities Administrators Association <http://www.nasaa.org>



Report Summary

MATTHEW MICHAEL MYERS (CRD# 2506930)

The report summary provides an overview of the representative's professional background and conduct. The information contained in this report has been provided by the representative, investment adviser and/or securities firms, and/or securities regulators as part of the states' investment adviser registration and licensing process. The information contained in this report was last updated by the representative, a previous employing firm, or a securities regulator on **04/17/2025**.

CURRENT EMPLOYERS

	Firm	CRD#	Registered Since
B	CAPFINANCIAL SECURITIES, LLC.	CRD# 126291	12/07/2023
IA	CAPTRUST	CRD# 175112	12/07/2023

QUALIFICATIONS

This representative is currently registered in **1** SRO(s) and **28** jurisdiction(s).

Is this representative currently Inactive or Suspended with any regulator? **No**

Note: Not all jurisdictions require IAR registration or may have an exemption from registration.

Additional information including this individual's qualification examinations and professional designations is available in the Detailed Report.

REGISTRATION HISTORY

This representative was previously registered with the following firm(s):

	FIRM	CRD#	LOCATION	REGISTRATION DATES
IA	TRUTINA FINANCIAL	148866	BELLEVUE, WA	11/02/2009 - 03/28/2024
B	PRIVATE CLIENT SERVICES, LLC	120222	BELLEVUE, WA	11/21/2013 - 12/08/2023
B	SIGNATOR FINANCIAL SERVICES, INC.	19061	BELLEVUE, WA	07/09/2009 - 10/31/2013

For additional registration and employment history details as reported by the individual, refer to the Registration and Employment History section of the Detailed Report.

DISCLOSURE INFORMATION

Disclosure events include certain criminal charges and convictions, formal investigations and disciplinary actions initiated by regulators, customer disputes and arbitrations, and financial disclosures such as bankruptcies and unpaid judgments or liens.

Are there events disclosed about this representative?

No
















Qualifications

REGISTRATIONS

This section provides the SRO, states and U.S. territories in which the representative is currently registered and licensed, the category of each registration, and the date on which the registration becomes effective. This section also provides, for each firm with which the representative is currently employed, the address of each location where the representative works. This individual is currently registered with **28** jurisdiction(s) and 1 SRO(s) through his or her employer(s).

Employment 1 of 2

Firm Name: **CAPFINANCIAL SECURITIES, LLC.**
Main Address: 4208 SIX FORKS ROAD, SUITE 1700
RALEIGH, NC 27609
Firm ID#: 126291

	Regulator	Registration	Status	Date
	FINRA	General Securities Principal	Approved	12/07/2023
	FINRA	General Securities Representative	Approved	12/07/2023
	Alabama	Agent	Approved	12/07/2023
	Arizona	Agent	Approved	12/07/2023
	California	Agent	Approved	12/07/2023
	Colorado	Agent	Approved	12/07/2023
	Delaware	Agent	Approved	12/07/2023
	Florida	Agent	Approved	12/07/2023
	Georgia	Agent	Approved	12/07/2023
	Hawaii	Agent	Approved	12/07/2023
	Idaho	Agent	Approved	12/07/2023
	Indiana	Agent	Approved	12/07/2023
	Iowa	Agent	Approved	12/07/2023



Qualifications

	Regulator	Registration	Status	Date
B	Kansas	Agent	Approved	12/07/2023
B	Kentucky	Agent	Approved	12/07/2023
B	Massachusetts	Agent	Approved	12/07/2023
B	Michigan	Agent	Approved	12/07/2023
B	Minnesota	Agent	Approved	12/07/2023
B	Missouri	Agent	Approved	12/07/2023
B	Montana	Agent	Approved	12/19/2023
B	New York	Agent	Approved	12/07/2023
B	North Carolina	Agent	Approved	12/11/2023
B	North Dakota	Agent	Approved	12/07/2023
B	Oregon	Agent	Approved	12/07/2023
B	Pennsylvania	Agent	Approved	12/07/2023
B	South Carolina	Agent	Approved	12/07/2023
B	South Dakota	Agent	Approved	12/07/2023
B	Texas	Agent	Approved	12/07/2023
B	Utah	Agent	Approved	12/07/2023
B	Washington	Agent	Approved	12/07/2023

Branch Office Locations

CAPTRUST FINANCIAL ADVISORS OR "CAPTRUST"
10811 MAIN STREET



Qualifications

BELLEVUE, WA 98004

Employment 2 of 2

Firm Name: **CAPTRUST**
Main Address: 4208 SIX FORKS RD
SUITE 1700
RALEIGH, NC 27609
Firm ID#: 175112

	Regulator	Registration	Status	Date
IA	Washington	Investment Adviser Representative	Approved	12/07/2023

Branch Office Locations

CAPTRUST
10811 MAIN STREET
Bellevue, WA 98004




Qualifications

PASSED INDUSTRY EXAMS



This section includes all industry exams that the representative has passed. Under limited circumstances, a representative may attain registration after receiving an exam waiver based on a combination of exams the representative has passed and qualifying work experience. Likewise a new exam requirement may be grandfathered based on a representative's specific qualifying work experience. Exam waivers and grandfathering are not included below.

This individual has passed 1 principal/supervisory exam, 2 general industry/product exams, and 2 state securities law exams.



Principal/Supervisory Exams

	Exam	Category	Date
	General Securities Principal Examination (S24)	Series 24	02/06/2003

General Industry/Product Exams

	Exam	Category	Date
	Securities Industry Essentials Examination (SIE)	SIE	10/01/2018
	General Securities Representative Examination (S7)	Series 7	08/12/1994

State Securities Law Exams

	Exam	Category	Date
	Uniform Investment Adviser Law Examination (S65)	Series 65	10/01/1999
	Uniform Securities Agent State Law Examination (S63)	Series 63	09/16/1994

PROFESSIONAL DESIGNATIONS

This section details that the representative has reported 1 professional designation(s).

Certified Financial Planner

This representative holds or did hold 1 professional designation(s) that may have been used to qualify as an Investment Advisor representative. Please check with the appropriate designation authority for verification that the designation is still in effect. The contact information for these professional designation authorities can be found on the website for the North American Securities Administrators Association at <http://www.nasaa.org>



Registration & Employment History

PREVIOUSLY REGISTERED WITH THE FOLLOWING FIRMS

This representative held registrations with the following firms:

	Registration Dates	Firm Name	ID#	Branch Location
IA	11/02/2009 - 03/28/2024	TRUTINA FINANCIAL	CRD# 148866	BELLEVUE, WA
B	11/21/2013 - 12/08/2023	PRIVATE CLIENT SERVICES, LLC	CRD# 120222	BELLEVUE, WA
B	07/09/2009 - 10/31/2013	SIGNATOR FINANCIAL SERVICES, INC.	CRD# 19061	BELLEVUE, WA
IA	01/31/2000 - 11/02/2009	BELLEVUE FINANCIAL	CRD# 114295	BELLEVUE, WA
IA	02/14/2000 - 09/30/2009	LPL FINANCIAL CORPORATION	CRD# 6413	BELLEVUE, WA
B	02/01/2000 - 09/30/2009	LPL FINANCIAL CORPORATION	CRD# 6413	BELLEVUE, WA
B	08/15/1994 - 01/31/2000	MML INVESTORS SERVICES, INC.	CRD# 10409	SPRINGFIELD, MA

EMPLOYMENT HISTORY

Below is the representative's employment history for up to the last 10 years.

Employment Dates	Employer Name	Position	Investment Related	Employer Location
11/2023 - Present	CapFinancial Partners LLC (CAPTRUST)	Investment Adviser Representative	Y	Raleigh, NC, United States
11/2023 - Present	CapFinancial Securities LLC	Registered Representative	Y	Raleigh, NC, United States
11/2013 - 11/2023	PRIVATE CLIENT SERVICES LLC.	FINANCIAL ADVISOR	Y	LOUISVILLE, KY, United States
07/2005 - 11/2023	TRUTINA FINANCIAL (DBA OF BELLEVUE FINANCIAL)	PARTNER/ADVISOR	Y	BELLEVUE, WA, United States

OTHER BUSINESS ACTIVITIES

This section includes information, if any, as provided by the representative regarding other business activities the representative is currently engaged in either as a proprietor, partner, officer, director, employee, trustee, agent, or otherwise. This section does not include non-investment related activity that is exclusively charitable, civic, religious, or fraternal and is recognized as tax exempt.

Name: MM & GS Holdings, LLC.

Address: 10811 Main St. Bellevue WA 98004



Registration & Employment History



OTHER BUSINESS ACTIVITIES

Not Investment Related

Nature: hold proceeds of sell of prior firm

Position/Title: Managing Member

Start: 11/16/2023

Hours/Month: 0.5

Hours during Market Hours: 0

Duties: manage LLC



End of Report

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