



## **Bill McManus, CIMA®**

Vice President and Managing Director  
Applied Insights

Bill is a seasoned professional with extensive experience in guiding financial professionals and their clients through the complexities of retirement and longevity planning. With a deep understanding of the financial landscape, he's dedicated to enhancing client experiences and helping financial professionals build more efficient, successful businesses.

As a sought-after speaker and consultant, Bill has a proven track record of delivering insightful and actionable strategies that help financial professionals optimize their practices. His engaging presentations and workshops are known for their clarity, practicality, and relevance, making complex financial concepts accessible and understandable. Bill is committed to empowering financial professionals with the knowledge and tools they need to better serve their clients and grow their businesses.

With a passion for continuous learning and a client-centric approach, he remains at the forefront of industry trends and best practices. Bill's dedication to excellence and unwavering commitment to his clients' success makes him a trusted partner in the financial advisory community.

Bill joined the organization in 2003 as an advisor consultant responsible for marketing Hartford Funds in Virginia and West Virginia. He has earned his Certified Investment Management Analyst (CIMA®) designation, completed the Securities Industry Institute® (SII) Executive Education Program through Wharton Executive Education, and is an alumnus of the Executive IQ Leadership Program through the Money Management Institute and The Darden School of Business at the University of Virginia. Bill is FINRA Series 7 and 63 registered.

Bill has been widely quoted in consumer and trade publications such as The Wall Street Journal and Barron's. He has also appeared as a featured guest on Bloomberg Radio to discuss his views on retirement-related topics.

Originally from Smithville, New Jersey, Bill attended the University of Pennsylvania where he earned a bachelor's degree in political science. He currently lives in Austin, Texas.