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- While focusing his business on his clients' individual financial objectives, William believes the most successful wealth management strategies look at the big picture, the comprehensive, solution-focused approach, delivered with constant personal attention and a commitment to his clients' best interests is what sets him apart.

- William is dedicated to managing and preserving wealth by establishing deep and valued relationships with you and your family. By gaining a comprehensive understanding of your needs and goals he enhances and preserve your investments, while assisting you with your goals through long-term financial solutions. He uses complex financial planning strategies such as estate planning, multi-generational wealth planning, family dynamics and governance, executive financial service compensation management, business succession and monetization strategies, asset management for liquid and illiquid assets, and risk and wealth management strategies for High Net Worth individuals and non-profits in the US.
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- Prior to joining Raymond James & Associates, William was a Senior Vice President, Wealth Advisor and Family Wealth Director, at Morgan Stanley. He also worked for Bernstein Global Wealth Management, as a Principal, Senior Investment Advisor. He was a Commercial Real Estate Broker, last as Senior Vice President and Corporate Account Manager in the Office Leasing Division of Grubb and Ellis Co. William began his career with Arco International Oil and Gas Company and was based in Jakarta Indonesia for 4 years.
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- William earned a Bachelor of Science of Business Administration from the University of Southern California and a Master of Business Administration from Pepperdine University. He was a mentor to the Graziadio School of Business at Pepperdine University, and has been a Founder and lecturer at the Chaminade Hawaii Tax Institute for twenty four years. He specializes in working with Family Offices and High Net Worth clients, Foundations, Venture Capital, Private Equity and Investment Banking. Bill, builds stand alone Alternative Investment and Private Equity Portfolios for Raymond James' Advisors and Clients. He is also a speaker in professional forums and Family Offices throughout the U.S, including most recently, the Alternative Investment Conference at Institutional Investor.