

Bill attended the University of Notre Dame graduating with a BA in Political Science and Psychology. He then obtained an MBA from Boston College with a concentration in Strategic Planning.

After graduating he spent six months training in the Hartford Insurance Company Career Development Program. Thereafter he served his apprenticeship with the ITT/Hartford as Special Agent/Territory Manager working out of their Detroit Regional Office. An opportunity to train for the Sales Manager position for the Fireman's Fund Boston Office brought him back to the New England Area. It was shortly after his return that he ventured in to the brokerage side of the business, assuming the role of Account Executive with Alexander & Alexander, Inc. where he managed a book of national accounts. The last stepping stone prior to his present day business venture involved a ten year partnership with Financial Associates/Insurance Inc., where he combined his insurance and financial knowledge with his academic expertise so as to be able to provide his customers with the widest range possible of insurance protection, investment growth products and business consulting.

Along the way, he acquired the CPCU designation, comparable to a CPA designation for an accountant, and the CIC designation, comparable to the JD/LLB designation for an attorney, which licenses him as and Insurance Counselor. Finally, the FINRA 6 & 63 licenses allow him to transact business in a variety of investment products such as mutual funds, variable annuities and pension plans.