



## Bill Whale, CFA, CAIA, CIPM

Manager, Global Alternatives  
PFM Asset Management LLC

Bill Whale serves as the lead for global alternatives research within the multi-asset class management team. In his role, he is responsible for manager selection and oversight that includes sourcing new manager ideas as well as continued monitoring of existing allocations. He also, in conjunction with the director of research and chief multi-asset class strategist, develops PFM's model alternatives portfolio and the framework for building out alternatives allocations for appropriate clients.

Bill graduated *summa cum laude* from Lock Haven University of Pennsylvania in 2016. He has since went on to earn the CFA charter, the CAIA charter and the CIPM designation.



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### Contact

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### Specialties

Alternative Finance, Asset  
Management

Endowments & Foundations

### Education

B.S. in Finance and  
Economics  
Lock Haven University of  
Pennsylvania

### Professional Designations or Licenses

Chartered Financial Analyst  
(CFA)

Chartered Alternative  
Investment Analyst (CAIA)

Certificate in Investment  
Performance Measurement  
(CIPM)

**Started with PFM:** 2016

**Started in the Field:** 2016