



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.



Contact

1735 Market Street
43rd Floor
Philadelphia, PA 19103

whalew@pfm.com
717.213.3849 office

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