

Bill McVay, CIMA, CFP®, ChFC joined Red Tortoise in 2017.

He has a background of more than 30 years in pension and investment consulting and is a frequent national speaker on investment management and performance evaluation issues. In 2007 he founded RDK Strategies to provide investment advice and business consulting services to financial institutions, endowments, foundations, corporations and pension funds. Prior to that he was Vice-President and a partner of financial software developer Zephyr Associates, the leading provider of style based investment analytics and Executive Vice-President of Financeware, Inc. Previously he was Co-Director of Investment Management Services for Legg Mason and the Director of the Investment Consulting Group where he developed and managed all retail and institutional consulting services, investment management research, client service programs, built and managed fee-based investment programs, investment advisory compliance systems, investment analytics, consulted with institutional clients and directed and oversaw the consulting activities of Legg Mason Financial Consultants. Bill also oversaw the managed futures and alternative strategies activities of Legg Mason Wood Walker, provided internal acquisition due diligence on investment advisory firms and was the President of LM Falcon Investment Strategies, Inc., a Legg Mason subsidiary specializing in developing alternative investment products and hedge funds.

Bill is a graduate of Southeast Missouri State University and holds the designations of Certified Investment Management Analyst (CIMA), Certified Investment Management Consultant (CIMC), Certified Financial Planner (CFP), Chartered Financial Consultant (ChFC) and Chartered Life Underwriter (CLU). He is a member of the Investment Management Consultants Association and the Southern Employee Benefits Conference. Bill is a past member of the Board of Directors of the Investment Management Consultants Association where he was also Treasurer and Vice-President. He has also served on the IMCA Industry Advisory Council and on the Consultants Performance Presentation Standards Task Force. He currently serves as an Independent Trustee of the AdvisorShares ETF Trust.

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