

WILLIAM G. MCVAY

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PROFESSIONAL EXPERIENCE & ACCOMPLISHMENTS

- RED TORTOISE LLC, Atlanta, Georgia 2017-present
An independent, boutique investment counseling firm
Principal
- RDK STRATEGIES LLC, Towson, Maryland 2007-present
Investment consulting services for plan sponsors, non-profit organizations and financial institutions.
Managing Member
- ADVISORSHARES ETF TRUST, Bethesda, Maryland 2011-present
Actively Managed ETFs.
Independent Trustee
- ZEPHYR ASSOCIATES INC., Zephyr Cove, Nevada 2001-2005
Global leader in the development of analytical software tools for the financial management industry.
Vice President
- Promoted the strategic development and execution of web-based versions of software products that included marketing, advertising, sales, public relations, product development, and distributor relations.
 - Supervise and motivate a cross-functional team of marketing, advertising, and sales professionals.
 - Identify, develop, present, and implement strategies and growth opportunities to generate sales and profits.
 - Develop short- and long-term departmental objectives that include organizational structure of associates.
 - Doubled revenues within four years by expanding and implementing marketing programs for financial advisors.
- FINANCEWARE INC., Richmond, Virginia 2000
Industry-leading probability analysis tools for financial advisors.
Executive Vice President – Director of Business Development
- Managed all sales and marketing functions that included market expansion, strategic planning and business development initiatives, cultivation of sales efforts, and contract negotiations.
 - Formulated strategic plans to define product line goals and business segment objectives.
 - Established, developed, and maintained strong relations with large financial services businesses.
- LEGG MASON WOOD WALKER INC., Baltimore, Maryland 1988-2000
Diversified independent financial services provider.
First Vice President – Director of Legg Mason Investment Consulting Group
- Produced, developed, and managed investment advisory products and services.
 - Established and managed marketing programs, compliance reporting, regulatory issues, trading systems, due diligence procedures, computer and technological systems, and administrative procedures.
 - Provided sales and services for institutional consulting client relationships.
 - Developed alternative strategies for clients that included hedge funds and managed future programs.
 - Collaborated with cross-functional teams to plan and coordinate development of new products into business.
 - Increased revenue from \$0 to more than \$60 million within 12 years through managed account products.

PROFESSIONAL AFFILIATIONS

Member, INVESTMENT MANAGEMENT CONSULTANTS ASSOCIATION;

Past Director, Treasurer and Vice-President

Member, INTERNATIONAL BOARD OF STANDARDS OF CERTIFIED FINANCIAL PLANNERS

Member, SOUTHERN EMPLOYEE BENEFITS CONFERENCE

EDUCATION, PROFESSIONAL DESIGNATIONS & LICENSES

SOUTHEAST MISSOURI STATE UNIVERSITY, Cape Girardeau, Missouri

Bachelor of Arts, 1976

INVESTMENT MANAGEMENT CONSULTANTS ASSOCIATION, Greenwood Village, Colorado

Certified Investment Management Analyst, 1993

Certified Investment Management Consultant, 1993

INTERNATIONAL BOARD OF STANDARDS OF CERTIFIED FINANCIAL PLANNERS, Denver, Colorado

Certified Financial Planner, 1984

AMERICAN COLLEGE, Bryn Mawr, Pennsylvania

Chartered Financial Consultant, 1983

Chartered Life Underwriter, 1982