



Bill McVay is the founder of RDK Strategies, a provider of business consulting services to financial institutions, investment managers and financial services providers.

Prior to founding RDK Strategies, Bill was Vice-President and a partner of financial software developer Zephyr Associates, Executive Vice-President of Financeware, Inc. and First Vice-President of Legg Mason Wood Walker where he was Co-Director of Investment Management Services and the Director of the Investment Consulting Group for eleven years. In his tenure at Legg Mason, Bill 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. Prior to Legg Mason, Bill was the Director of the Asset Management Consulting Group at Shearson Lehman Brothers.

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.

Bill has a background of more than thirty years in pension and investment consulting and is a frequent national speaker on investment management and performance evaluation issues.

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