

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. Bill develops PFM Asset Management's model alternatives portfolios and the framework for building out and maintaining alternatives allocations for appropriate clients. Additionally, his role includes overseeing existing managers & prospecting of new alternative strategies. His sub-asset class views and manager proposals are presented to the MACM Investment Committee. Bill plays an integral role communicating alternatives industry trends and portfolio decisions across the firm.

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

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Specialties

Endowments, Foundations &
Charitable Institutions

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