

# Bill Bolas, CRPC™

## Senior Managing Director & Partner



### Contact Bill Bolas

#### Westlake Office

159 Crocker Park Blvd, Suite 300  
Westlake, OH, 44145  
Office 440-462-0977  
bill.bolas@oxfordharriman.com

Bill is a Senior Managing Director and Partner of Oxford Harriman & company in Westlake, Ohio.

Bill is a distinguished financial advisor whose career in the financial services sector commenced in 2002 with American Express Financial Advisors, presently known as Ameriprise Financial. As a former District Manager, Bill played a crucial role in fostering the advancement and expansion of numerous emerging advisors.

In 2009, Bill pivoted back to a client-focused role, allowing him to apply his extensive knowledge and expertise more directly to help individuals, families, and institutions. Prior to joining Oxford Harriman & Company, Bill was a Managing Director for Wells Fargo Advisors in Westlake, Ohio.

Specializing in comprehensive investment planning, Bill's advisory practice encompasses a broad spectrum of areas, including retirement and education planning, tax advantaged strategy, investment guidance, as well as preservation and estate planning strategies. Bill also offers specialized consulting on Social Security, Medicare, and pension election choices.

Bill graduated with a bachelor's degree in business administration from St. Bonaventure

University, with a dual major in accounting and finance. Bill's commitment to continuous learning is demonstrated by his attainment of the Chartered Retirement Planning Counselor<sup>SM</sup> designation and his ongoing participation in advanced training courses each year.

Bill's excellence as a financial advisor has been recognized by Wells Fargo Advisors, earning him the Platinum Council (formerly Premier Advisor) distinction consecutively from 2018 to 2023 and Sapphire status in the 2024 Platinum Council Program.

Bill resides in Rocky River, Ohio with his wife Amy, their three daughters, and their dog Sullivan. Bill leads a full and active personal life. He is a passionate sailor, a former two-time U.S. Sailing semifinalist, and enjoys running, basketball, golf, reading, and traveling.

As an engaged community member, Bill serves on the board of trustees for the Cleveland Yachting Club and has contributed significantly to various charitable organizations, including co-chairing the Cleveland Leukemia Cup Regatta.

### ABOUT WELLS FARGO ADVISORS FINANCIAL NETWORK

For more than 20 years, Wells Fargo Advisors Financial Network, the independent contractor business model of Wells Fargo Wealth & Investment Management (WIM), has offered financial advisors more control, flexibility, and growth around business ownership as well as support from one of the nation's largest financial institutions. WIM provides financial products and services through various bank and brokerage affiliates of Wells Fargo & Company. Investment products and services are offered through Wells Fargo Advisors Financial Network, LLC, Member SIPC (WFAFN), a registered broker-dealer and non-bank affiliate of Wells Fargo & Company. Any other referenced entity is a separate entity from WFAFN.