OXFORD | HARRIMAN & COMPANY

# Bill Bolas, CRPC™

## Senior Managing Director & Partner

**2025 #159 Forbes Best-In-State Wealth Advisors**

**100 Solo Advisors to Watch in the U.S. for 2025 #35**

**(AdvisorHub)**

**2018-2025 Wells Fargo Platinum-Council Advisor**


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℠ 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.

*Wells Fargo Advisors Financial Network does not provide legal or tax advice.

### 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. PM-02042027-6597963.1.2

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2025 Forbes Best-In-State Wealth Advisors; Awarded April 2025; Data compiled by SHOOK Research LLC based on the time period from 6/30/23- 6/30/24 (Source: Forbes.com). The Forbes Best-in-State Wealth Advisors rating algorithm is based on the previous year's industry experience, interviews, compliance records, assets under management, revenue and other criteria by SHOOK Research, LLC. Investment performance is not a criterion. Self-completed survey was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria.

2025 AdvisorHub Advisors to Watch: Awarded June 2025; Data compiled by AdvisorHub based on the time period from 12/31/23 - 12/31/24 (Source: AdvisorHub). The AdvisorHub 2025 Advisors to Watch (A2W) rating produced by AdvisorsHub is based on industry experience, assets under management, revenue, growth, compliance records, professionalism, and other criteria. Investment performance is not a criterion. Self-completed survey was used for rating. The rating is not related to the quality of the investment advice and is based solely on the disclosed criteria. A2W winners are then ranked into subcategories based on scale, growth and professionalism with each winner being ranked into only one subcategory. The 100 Solo Advisors to Watch ranking is a subcategory of the AdvisorHub 2025 Advisors to Watch rating and does not denote an additional rating. 1974 wealth managers were considered for the rating; 1000 (50.6% of candidates) were named 2025 AdvisorHub Advisors to Watch.

Platinum Council 2024/2025: The Platinum Council distinction is held by a select group of Financial Advisors within Wells Fargo Advisors Financial Network as measured by business production from the previous year and professionalism.

Platinum Council 2018-2023: The Platinum Council distinction is held by a select group of Financial Advisors within Wells Fargo Advisors Financial Network as measured by one or more of the following: completion of educational components, business production from the previous year, and professionalism. Additional consideration may have included best practices and team structures.

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