

Bill Bolas, CRPC® Senior Managing Director & Partner



Contact Bill Bolas

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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 protection 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

The Platinum Council (previously known as Premier Advisor) distinction is held by a select group of Financial Advisors within Wells Fargo Advisors Financial Network as measured by completion of educational components, business production based on the past year, and professionalism. Additional criteria, best practices and team structure, may also be used to determine recipients.

Platinum Council levels are based on the previous calendar year's gross revenue, and are defined as follows: Diamond – Top 25 Financial Advisors, Ruby – Top 2% (including Diamond recipients), Emerald – Next 5%, Sapphire – Next 8%, Pearl – Best Practice Adopters with a minimum production \$750k.

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 CounselorSM 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 over 20 years, Wells Fargo Advisors Financial Network, the independent brokerage arm of Wells Fargo & Company, has simplified independence by partnering with successful financial advisors and fostering a mutual passion for doing what's right for clients. We chose to partner with Wells Fargo Advisors Financial Network because they offer a variety of resources available to our clients including access to industry research, technology and world class products. Together, we are able to offer a full-service platform with comprehensive wealth management strategies, including access to lending services through Wells Fargo affiliates.