THE Princeton GROUP
Oxford Harriman & Company

# Bill Schultz CFP®
## Managing Director


Contact Bill Schultz

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**You can tell a lot about a financial advisor from how they've built their practice.**

Bill built his by seeing the world through his clients' eyes. That's because every person leads a singular life, and each requires an individualized investing strategy.

In his eyes, generic solutions won't cut it—and he's devoted the last 22 years to building highly-personalized portfolios from scratch.

### Due Diligence

Bill wears two hats: His planning hat and his trading hat.

He often switches between the latter two during meetings—but only after he's done his extensive due diligence in getting to know the ins and outs of his clients' needs.

That deep dive into fully understanding his clients is foundational to creating goals-based investment planning that focuses on growth, family and other objectives. Whenever possible, he creates synergistic portfolios that reflect the views, values and beliefs his clients hold.

### Smart Work Pays Off

Bill's well-rounded education includes many certifications. He holds his Series 7, 9, 10, 21, 63 and 65 securities registration, a Social Security and Medicare planning certificate, insurance licenses plus certification as he's also a CERTIFIED FINANCIAL PLANNER® professional.

But it's a real-life commitment he values the most: Being available. While other advisors might shut off at 4pm, Bill's no stranger to answering calls on a Friday night or Sunday morning. Otherwise, he would be neglecting his clients' dreams. And that's not how he built his practice.

### Outside the Office

Bill roots for the Philadelphia Eagles and whichever team is playing the Cowboys. He's a globetrotter who enjoys discovering new destinations, with Jerusalem being his favorite. Bill is also a founding member of Collegeville's Business Network International.

He's ecstatic to be married to Renee, his wife of 26 years. They're the proud parents of two children and call Limerick home.