

William V. Lewis, Jr. CFP® CAP® CLU® CPM®

Managing Principal, PIM Portfolio Manager



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Bill Lewis is a Managing Principal and PIM Portfolio Manager with Lewis, Litwinsky & Associates of the Princeton Group, Wells Fargo Advisors Financial Network. He started his career in the financial services industry at Merrill Lynch Wealth Management in 1986 and joined Wells Fargo Advisors Financial Network in November 2020.

Bill received a Bachelor of Arts degree and a Master of Business Administration degree from Wilkes University, a Master of Science degree in Financial Services from the American College of Financial Services, a Master of Arts in American History from Pace University, and holds a Master of Public Administration and a Doctor of Arts degree from Lehigh University. Professionally, Lewis is a CERTIFIED FINANCIAL PLANNER® Certificant, awarded by the CFP® Board of Standards, Inc. He has earned the Chartered Financial Consultant® designation, the Chartered Life Underwriter® designation, and the Chartered Advisor in Philanthropy® designation from The American College. He also holds the Chartered Retirement Planning Counselor™ and the Chartered Retirement Plans Specialist™ designations from the College for Financial Planning. He holds the Certified Portfolio Manager designation through the Academy of Certified Portfolio Managers. Additionally, Bill holds his Series 7, Series 24, Series 63, and 65 FINRA securities registrations, as well as his PA Life and Health Insurance Licenses.

Currently, Bill is a Commissioner of the Pennsylvania Historical and Museum Commission, a Board Member of the Hollenback Cemetery, and a member of the Board of Directors of the Academy of Certified Portfolio Managers. Previously, he served on the

national Board of Governors of The American Red Cross; on the National Advisory Council of the Center for the Study of the Presidency; on the national Board of Family Service America; is a Past President of the Luzerne County Historical Society; a Past President of the Family Service Association of Wyoming Valley; a Past President of St. David's Society of Wyoming Valley; a Past Chairman of the Wyoming Valley Chapter of the American Red Cross; and a Past President of the Northeast Chapter, Sons of the American Revolution.

Bill received the Rose Brader Community Service Award from the United Way of Wyoming Valley and was awarded the Clara Barton Honor Award for Meritorious Volunteer Leadership from The American Red Cross. He has served as an adjunct professor at Wilkes University and as an adjunct faculty member at King's College.

Bill is married with four grown children and resides in Pittston, PA.

The 1997 Rose Brader Community Service Award by United Way of Wyoming Valley was bestowed by United Way of Wyoming Valley as a result of community efforts, unrelated to the business of the firm.

The 2002 Clara Barton Honor Award for Meritorious Volunteer Leadership by The American Red Cross was bestowed by The American Red Cross as a result of community efforts, unrelated to the business of the firm.

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