Your Guide to Unbiased Financial Solutions…

Bill Spalding Financial Services

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Practice Focus

- Professional Money Management
- Objective Investment Advice
- Retirement Income Planning
- Wealth Accumulation Strategies
- Tax Advantaged Portfolios

Education

- Masters in Education, University of Pittsburgh
- Bachelors of Science Degree

Affiliations

- Former Chairman, Sandy Springs Business Association
- Past President, Atlanta Metro Serra Club
- Member, Luxury Marketing Council of Atlanta
- Founding Member of Advisory Council, Lockwood Financial
- Founding Member of Quality Council, Securities America
- Qualifying Member, Securities America Masters Forum

Media Resource

- Financial Columnist, Sandy Springs Living Magazine
- Financial Planning magazine
- Featured Speaker, Queen Elizabeth II Cruise Line and Mississippi Delta Queen Cruise Line

William B. Spalding

Financial Advisor Representative

Bill Spalding has over 25 years of extensive financial planning experience. As founder of Bill Spalding Financial Services in Atlanta he concentrates on helping people attain their personal financial objectives by educating them on matters related to risk tolerance, market exposure, long range planning, and individual circumstances that might affect their financial well-being. With so many pressures and choices today, Spalding believes an independent, objective, educated approach is the way to manage money and improve the financial decision-making process.

Focusing on the client's objectives, Bill bases his investment philosophy upon five principles: asset allocation, portfolio structure, tax management, multiple specialist managers and continuous portfolio management. He pulls these financial principles together to create a diversified and personalized investment management program. His is a strategy geared towards achieving long-term investment goals in a variety of market conditions.

Over the years Bill has found it rewarding to share his insights regarding financial principles with the public. He currently writes a financial column for the Sandy Springs Living Magazine. He has been a featured speaker at several national conferences for financial planning professionals. He also speaks at schools and to adult groups regarding the importance of ethics and honesty in both business and personal life.

Based on assets under management, Bill was recognized three consecutive years as one of the top five advisors with Securities America Advisors, out of approximately 1200 representatives. Bill earned his master's degree from the University of Pittsburgh and is a past Chairman of the Sandy Springs Business Association.

Bill balances his work with times spent with his wife Stephanie. Both are active members of their church and community. Beyond the investment management field, Bill is an avid reader, a student of history and the arts, and enjoys gardening, golf and travel.