



William E. Bates
CLU[®], ChFC[®]
Financial Advisor

600 Grant Street
U.S. Steel Tower, Suite 1200
Pittsburgh, PA 15219-2776
Phone: **412-201-5850**
Toll Free: **800-569-9367 Ext. 5850**
Fax: **412-201-2524**
Email: **bates.bill@principal.com**

Bill specializes in:

- **Wealth Accumulation and Transfer Planning**
- **Retirement Planning**
- **Estate Planning and Benefits For Company Executives and Business Owners**
- **Disability and Long-Term Care Planning**

Bill's mission is, "to help my clients achieve their long-term goals for themselves, their families and their businesses in ways that will potentially increase their assets through proper asset allocation and tax planning."

Bill is a graduate of Shady Side Academy, has a bachelor's degree in business from Franklin and Marshall College and a master's degree in business administration from Washington University in St. Louis. He obtained his Chartered Life Underwriter (CLU[®]) and Chartered Financial Consultant (ChFC[®]) designations from The American College in Bryn Mawr, Pennsylvania.

In the industry, Bill has been recognized as a lifetime member of the elite Million Dollar Round Table, qualified for its Court of the Table and Top of the Table and received the National Quality Award for client retention for twenty-five consecutive years.

Bill is a Financial Advisor with Princor Financial Services Corporation a member of the Principal Financial Group[®]. His professional affiliations include membership in the Pittsburgh and Pennsylvania Chapters of the National Association of Insurance and Financial Advisors (NAIFA) and the Estate Planning Council.

He is a former trustee of Shady Side Academy, past president of the Pittsburgh chapters of the Franklin and Marshall College and Phi Kappa Psi fraternity alumni associations and has been a volunteer officer and fundraiser for many non-profit organizations. He has spoken to numerous community and industry groups, including the Million Dollar Round Table's annual meeting. He has published articles in professional journals.

