

Executive Profile



BILL STONE, CFA[®], CMT CHIEF INVESTMENT STRATEGIST PNC ASSET MANAGEMENT GROUP

Bill Stone is executive vice president and chief investment strategist for PNC Asset Management Group. He is responsible for leading the strategy teams for PNC Wealth Management[®], PNC Institutional Asset Management[®] and Hawthorn, PNC Family Wealth[®] in monitoring the factors that influence the direction of domestic and international financial markets.

He is a member of PNC's Investment Policy committee and is responsible for defining the asset allocations and portfolio strategies used throughout PNC to advise individual and institutional investors. In addition, he is chairman of PNC's Portfolio Construction committee where he directs the activities to design, monitor and support the various model portfolios utilized throughout the organization. In addition to traditional portfolios, these include PNC's innovative liquid alternative and smart beta strategies. He is a voting member on PNC's Investment Advisor Research committee, which oversees manager due diligence, and multiple other governance committees.

Stone joined PNC Wealth Management in 2000, serving most recently as chief investment officer and investment director of the Pittsburgh and Boston markets. In this role, he provided investment leadership in the creation and implementation of investment strategies. Stone's professional experience also includes several positions with Wall Street firms, most notably as financial analyst at Salomon Brothers and institutional sales with Smith Barney. He also served as chief investment officer at First Western Trust.

In addition, he is a popular public speaker and has presented at numerous U.S. and international conferences. He often appears on U.S. and international TV and radio as well as in print media to share his keen insights into the global financial markets. His expertise has been featured on ABC, Bloomberg, Bloomberg Asia, CNBC, CNBC Asia, Fox Business, and NHK World. He has been quoted extensively in the financial press, including *The Wall Street Journal*, *Financial Times*, *Bloomberg News*, *Barron's*, *USA Today*, and *The New York Times*. He became a contributor to *Forbes* in 2014.

He is a member of the Union League of Philadelphia and previously served on the board of directors of the Economy League of Greater Philadelphia.

Stone is a cum laude and Honors Program graduate of the University of Dayton with a degree in Finance. He earned a master's degree in Business Administration from the University of Pittsburgh's Katz Graduate School of Business. He earned the Chartered Financial Analyst[®] and Chartered Market Technician designations.

Title

Executive Vice President and
Chief Investment Strategist
PNC Asset Management Group

Responsibilities

Leads the strategy teams for
PNC Wealth Management[®], PNC
Institutional Asset Management[®]
and Hawthorn, PNC Family
Wealth[®] in monitoring the
factors that influence the
direction of domestic and
international financial markets.

Corporate and Community Leadership

> Union League of Philadelphia