FRANKLIN TEMPLETON | **The Academy**

Meet Your Speaker



Bill Cass, CFP®, CPWA®
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Background

Bill Cass joined Franklin Templeton in 2024 as the Director of Wealth Planning, following the firm's acquisition of Putnam Investments, where he served in a similar role for many years. He leads a team of subject matter experts helping financial advisors navigate taxes, wealth transfer, retirement, college funding and Washington policy developments.

A frequent presenter at industry conferences, Bill speaks regularly throughout the country to groups of financial advisors and investors on a wide range of wealth planning topics. He is known for distilling complex concepts into practical, actionable strategies to help improve client outcomes. He has been in the investment industry since he joined Putnam in 1990.

Experience and Credentials

Bill holds a bachelor's degree in economics and political science from Tufts University and is a CERTIFIED FINANCIAL PLANNER® professional as well as a Certified Private Wealth Advisor® professional. He holds his Series 6, 7, 26 and 63 licenses with FINRA.

Personal

Outside of work, Bill enjoys spending time with family, staying active and following Boston sports teams.

Our mission is to empower our partners with insights, education and consulting to drive extraordinary outcomes. We are committed to providing knowledge and resources designed to help you stay ahead and grow your business. With a comprehensive engagement model, we offer a range of programs focused on investment education, professional development and wealth planning.

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