



**Bill McManus, CIMA®**

Vice President and Managing Director  
Applied Insights

With 20 years of experience in financial services, Bill has worked with countless financial professionals and their clients. He's got a knack for simplifying complex financial planning and investing strategies to engage and educate clients and prospects. He's also passionate about helping them look toward the future to anticipate and prepare for lifestyle changes that lay ahead.

Among other practice-management strategies, Bill shows financial professionals how they can optimize their prospecting strategies in a tech-driven world.