

Bill Overgard, President WHO Investment Consultants, Past Director Buck Consulting, Managing Director of Barra Rogers Casey.

William H. Overgard

PROFESSIONAL EXPERIENCE

WHO INVESTMENT CONSULTING CO., Wilton, CT **2000-Present**
President

Provides business, marketing and investment strategy to institutional investors, investment advisors, consultants and hedge funds.

BARRA RogersCasey **1997-2000**
Managing Director

Hired to determine the business viability of providing investment services to financial intermediaries and to establish a business unit to focus on those services. BRC had a few financial intermediary clients spread among different consulting groups with no consolidated business development plan and no emphasis on growing this segment of the business.

- After review of existing clients, market potential, BRC consulting capabilities, competition and profit potential, determined there was a very attractive business opportunity to “joint venture” on a revenue sharing basis with financial intermediaries to develop and implement products for the individual investor market.
- Increased the business unit’s revenues 150% to \$3,000,000 and provided almost 30% of BRC total profits in the 2000 fiscal year. Developed a highly effective team that received significant praise from clients for quality of work, creativity and ultimate contribution to the success of the products.

INVESTOR PROTECTION SERVICES, Greenwich, CT **1994 - 1997**
Managing Director, Secretary, Treasurer

Recognized the accounting and marketing potential of creating financial and investment hedges through insurance policies.

- Co-founded a risk management-consulting firm that specialized in integrating property and casualty, financial guaranty, and financial and foreign exchange risk management structures.
- Advised and structured a broad array of risk transfer structures using the world largest insurers and reinsurers and the capital markets.
- Licensed insurance consultant.

WHO INVESTMENT CONSULTING CO., Wilton, CT **1992 - 1997**
President

Founded a consulting company to provide investment strategy and marketing guidance to investment advisory companies.

- As Chief Investment Strategist, developed operations and marketing strategy for a synthetic global