

**Dr. William Reichenstein, CFA**

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**Principal of Retiree, Inc.**

Dr. William "Bill" Reichenstein holds the Pat and Thomas R. Powers Chair in Investment Management at Baylor University. He is an Associate Editor of *Journal of Investing*. He serves on the Editorial Board of the *Journal of Financial Education*, on the Editorial Review Board of the *Journal of Financial Planning*, and on the Editorial Advisory Board of the *Journal of Applied Business Research*. He also serves as a consultant to TIAA-CREF.

He is past president of the Southwestern Finance Association. He served two terms as Associate Editor of *Financial Services Review* and served on the Review Board of the Research Foundation of the Institute of Chartered Financial Analysts. He received the Teacher-of-the-Year Award in Business Administration at the University of Wisconsin-Milwaukee, the Top Professor Award at the University of North Texas, and a teaching award at Baylor University. He received the Researcher of the Year Award at Baylor University in 1999 and Outstanding Researcher Awards in finance at the University of North Texas in 1988, 1989, and 1990.

Dr. Reichenstein has written more than fifty articles for professional and academic journals. He is a frequent contributor to *Financial Analysts Journal*, *Journal of Portfolio Management*, and *Journal of Investing*. His work has been discussed in the *Wall Street Journal*, *Barron's*, *Forbes*, *Smart Money*, and elsewhere and he is frequently quoted in newspapers throughout this country.

His recent work concentrates on the interaction between investments and taxes. He advocates calculating an individual's after-tax asset allocation based on after-tax balances in each savings vehicle. He is the author of *In the Presence of Taxes: Applications of After-Tax Asset Valuations* (FPA Press, 2008), and co-authored with William Jennings *Integrating Investments and the Tax Code* (John Wiley & Sons, 2003). *Social Security Strategies* is his latest book, which he co-authored with William Meyer (Reichenstein and Meyer, 2011).