



EXECUTIVE FORUM '18

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Bill leads research for the Fidelity Center for Applied Technology and Fidelity Labs, which serve as innovation catalysts for Fidelity Investments. The Research team finds and evangelizes the ideas that will matter most to Fidelity five years from now, in order to provoke action faster than it would occur otherwise, via communities of practice, reports, presentations and more.

Before joining Fidelity in 2015, Bill spent 18 years at Forrester Research, where he led the company's coverage of the financial services industry, with a special focus on digital strategy. He wrote more than 150 reports, including "Customer Advocacy: The Secret To Loyal Financial Services Customers," and helped more than 100 retail financial services firms develop their electronic delivery strategies. As host of Forrester's annual Financial Services Forum, Bill conducted on-stage interviews with the chairmen and CEOs of dozens of major firms, including Bank of America, Citi, Charles Schwab and Vanguard.

Before joining Forrester, Bill spent 14 years designing, building, and running online services for business and consumer users at AT&T, Citibank, EF Hutton, and Ziff-Davis. He was also a researcher and writer at Newsweek. Bill is an honors graduate of Harvard University.

