



Bill Wyman

PRESIDENT, FAMILY OFFICE SERVICES

Bill joined Summitas in 2010 and has over 40 years of experience working with single- and multi-family offices and registered investment advisors (SFOs, MFOs, and RIAs). Today, Summitas is the award-winning reference platform for communication privacy and data security in the family office and wealth advisory space.

Previously, he was a Senior Director with BNY Mellon Family Office and Managing Director with Rockefeller & Co. Earlier, he was Managing Director at Deutsche Bank, and a Vice President with J.P. Morgan in Geneva, Switzerland.

Bill is a regular at industry conferences where he speaks about software trends, technology risks, and family office operations. He earned his BA from the University of Notre Dame and MBA, summa cum laude, from Fordham University.