



Shelterwood Financial Services

INVESTING FOR GENERATIONS

ABOUT

INVESTMENT SERVICES

WEALTH ADVISORY SERVICES

FAMILY OFFICE SERVICES

NEWS, EDUCATION & PUBLICATIONS



INTEGRATED WEALTH MANAGEMENT

OUR FAMILIES

HISTORY

SENIOR TEAM



William E. Rankin, CFA
Principal & Chief Executive Officer

As Chief Executive Officer, Mr. Rankin oversees Shelterwood's client service, investment and business development efforts. He has over 30 years of experience in the banking, investment and wealth management industries, both

domestic and offshore.

Prior to Shelterwood, Mr. Rankin served as Chairman of the Atlantic Trust Company following the firm's 2004 acquisition of Stein Roe Investment Counsel, where Mr. Rankin was President and CEO. As combined entities under Mr. Rankin's leadership, Atlantic Trust and Stein Roe managed \$16 billion for wealthy families and related institutions.

Mr. Rankin also served as Managing Director at Rockefeller & Co., where he was responsible for the firm's third-party family, foundation and endowment clients. Prior to Rockefeller, he was with Prudential Investment Management and Mellon Bank.

Additionally, he is a member of the Board of Trustees at Bryn Mawr College, where he is Co-Chairman of the Audit Committee and a member of the school's Investment Committee overseeing Bryn Mawr's \$650 million endowment fund.

Mr. Rankin earned his Master of Business Administration degree from the Wharton School of the University of Pennsylvania and a Bachelor of Engineering Science degree from Johns Hopkins University.

William E. Rankin, CFA
Principal & Chief Executive Officer

Alanson B. Houghton
Principal & Chief Investment Officer

Peter W. Tortorello
Principal & Chief Operating Officer

Tara A. Duffy
Managing Director

Warren L. Page
Controller & Chief Compliance Officer

Senior Advisor

Advisory Board

