

Bill Reichenstein, Ph.D.

Professor Emeritus of Investments at Baylor University

Waco, TX, US

Dr. Reichenstein researches Social Security benefits, how retirees can lengthen the longevity of financial portfolios and other tax issues

Biography

Dr. William Reichenstein, CFA, is Professor Emeritus of Investments at Baylor University. He is Head of Research at Social Security Solutions, Inc, a firm that developed software to help individuals decide when to begin Social Security benefits (www.ssanalyzer.com) and Income Solver, Inc., a firm that helps retirees tax-efficiently withdraw funds from their financial portfolio (www.incomesolver.com). He has published more than 180 articles and several books, including *In the Presence of Taxes: Applications of After-tax Asset Valuations*, FPA Press (August 2008) and with William Meyer *Social Security Strategies*, 3rd Edition. His recent work concentrates in two areas. First, when should individuals begin Social Security benefits? Second, how can we add value to client accounts using the tax code? His research advocates calculating an individual's after-tax asset allocation that compares after-tax fund across savings vehicles (e.g., 401(k), Roth IRA, and taxable accounts). His research also has implications for the asset-location decision among other issues. He is a member of Wall Street Journal's "The Experts" panel.

Industry Expertise

Capital Markets, Investment Management, Financial Services, Insurance

Areas of Expertise

Social Security, Financial Planning, Retirement Investing, Tax-based Investment Strategies, Finance, Wealth Management

Education

University of Notre Dame

Ph.D.

St. Edward's University

B.A.

Accomplishments

Reader's Choice Award - Financial Analysts Journal Graham & Dodd Awards of Excellence

The Graham and Dodd Awards were created in 1960 to recognize excellence in research and financial writing and to honor Benjamin Graham and David L. Dodd for their enduring contributions to the field of investment analysis.

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