

## WILLIAM OWEN – 308 SALT MARSH - WMOWEN425@GMAIL.COM

**OBJECTIVE** I am interested in continuing to contribute my skills, background and experience as a Board member of the Cascades of Groveland Homeowners Association to improve our community and strengthen our financial position.

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**SKILLS & ABILITIES** Investment advisor and financial planner. Significant skills in administration, financial management, accounting, contracts management, real estate, operations and planning.

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**EXPERIENCE**

**INDEPENDENT ADVISOR REPRESENTATIVE-FINANCIAL & ESTATE PLANNER**  
Smith Barney, Morgan Stanley, Citi Group, MetLife, Mass Mutual  
Provided securities brokerage, advisory services, Endowment-Trust management and retirement planning & implementation services to individuals and businesses

**PHOENIX ACQUISITIONS GROUP**  
Real estate administration, purchasing, renovation & title services

**CLARK EQUIPMENT COMPANY**  
Rental, Leasing & Contracts manager for industrial material handling equipment

**COMMERCAIL CREDIT EQUIPMENT COMPANY – AIRCRAFT DIVISION**  
Leasing & Financing of business & commercial aircraft

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**EDUCATION**

**UNIVERSITY OF WISCONSIN – BBA**  
Real Estate & Accounting

**KELLER GRADUATE SCHOOL – MBA**  
Managerial Finance, Project management, Investment & Contracts management

**FAA LICENCED PILOT**

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**BOARD EXPERIENCE**

**CASCADES OF GROVELAND HOMEOWNERS ASSOCIATION –TREASURER**  
**CITY OF GROVELAND RETIREMENT REVIEW TASK FORCE**  
**YMCA OF DUPAGE COUNTY – BOARD OF DIRECTORS**  
**FIRST UNITED METHODIST CHURCH – BOARD OF TRUSTEES**  
**BOY SCOUTS OF AMERICA – PLANNING & STAFFING COMMITTEES**  
**UNIVERSITY OF WISCONSIN FLYING CLUB – EXECUTIVE BOARD**

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**LEADERSHIP**

Dir. Liaison -ACB, Arts & Entertainment Group, Gov Documents Committee  
Men's Trilogy Tuesday golf group  
Angel Flight volunteer pilot

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