CMSIX

Bill Sherman

Head Portfolio Strategist

Bill is a long-time professional money manager who has spent much of his professional life providing investment management services to money management firms, individual investment advisors and brokers across the country. He has directly managed more than $600 million and advised money management firms of all types and sizes.

A native of St. Louis, MO, Bill graduated from Washington University in 1969 as a mechanical engineer. Bill developed an in-depth expertise in computerized analysis and statistical measurements over the years and is a recognized expert in several areas of the investment universe.

Bill Sherman and Jim Gissy go back to 2003, when the two of them first crossed paths in professional circles. In 2008, Jim became a subscriber to The Sherman Sheet; and in 2011, CMS began its third-party manager relationship with Bill, becoming sanctioned to utilize Bill's methods and models in order to offer Sherman-driven model portfolios to other advisors, and to employee retirement-plan sponsors. Bill, a native of St. Louis, Missouri, graduated from Washington University in St. Louis in 1969 with a Bachelor's Degree in Mechanical Engineering.

He began as an automotive-based mechanical engineer for International Harvester and went on to pioneer production-line automation for various manufacturing concerns until the late 1970s. In 1980, Bill joined Digital Equipment Corporation as a software engineer; in that time, Bill was assigned to the Pentagon for secure-communications software development, and later worked with the Hong Kong/Shanghai Bank (HSBC) on developing currency-trading workstation software. Eventually Bill went independent as a software consultant and developer, starting in 1987. In 1999, Bill began rolling-out automated stock-market trading systems, selling the first signals to institutional money managers; he transitioned to portfolio manager for RIA and pension clients in 2001.

Bill started publishing market research and commentary for investors and investment advisors in 2004; since 2007, he has been serving the professional advisor community exclusively.

Instead of the same old tired and discredited investment strategies, The Sherman Sheet provides a coherent, nimble and easy-to-explain tactical approach that can dramatically outperform in both Bull and Bear markets. With The Sherman Sheet as your private market expert, you'll enjoy more freedom to spend your time where you should be spending it, managing your clients and growing your business.

We deliver to you all the research, tools and analysis you need to stay on top of ever-changing market conditions. Better yet, we also provide numerous time-saving pre-built Model Portfolios that cover most any client circumstance - and with our unique Model Portfolio Toolkit you can even create custom blended models of your own design.