

William T. Norris

Chief Fiduciary Investment Officer

J.P.Morgan Private Bank and Private Wealth Management

20 years of investment experience

27 years with J.P.Morgan

Experience

William (Bill) Norris is the Chief Fiduciary Investment Officer for J.P.Morgan's Private Bank and Private Wealth Management Services Fiduciary Group. In this role oversees all investment activities for the trust clients of the firm. Working with the investment strategy group in the firm, Mr. Norris oversees asset allocation strategy for the fiduciary clients as well as investment solutions selection.

Previous to this role, Mr. Norris was Head of Portfolio Management in Private Client Services for Bank One overseeing a staff of over 100 portfolio managers and total assets over \$ 45bln.

Mr. Norris began his investment career in 1981 at a subsidiary bank of First National Bank of Chicago, managing institutional fixed income portfolios in excess of \$500 million. In 1987, he joined the trust department as vice president and investment officer to oversee fiduciary and ERISA accounts investing in equity securities, fixed income securities, real estate and mutual funds.

In 1994, Mr. Norris became vice president at First Chicago Investment Management Company and developed retail investment management products for individuals. Two years later, he rejoined the trust department as vice president and senior portfolio manager. He assumed the role of director of portfolio management for the Chicago-based portfolio management teams in 1999.

Mr. Norris has been a speaker at the National ABA Trust Operations Conference on asset allocation; The American Bar Association Conference on Prudent Investor (2007); and The New York Banker's Association Annual Meeting on Trust Open Architecture (2007). Mr. Norris has also been a speaker at the Heckerling Institute for Estate Planning.

Education

B.A., Cum Laude, Finance, North Central College (Naperville, IL)

Graduate, with honors, Illinois Bankers School, Southern Illinois University

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