

## WILLIAM C. MONTAGUE

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### PROFESSIONAL EXPERIENCE

#### Senior Investment Writer

June 2008 - February 2026

Employer: T. Rowe Price Associates, Baltimore, MD

Created client-facing content for a major asset management firm, with primary emphasis on white papers, asset allocation studies, strategic market analysis and other thought leadership pieces for the institutional and wealth markets. Worked with client relationship managers to support the firm's brand and sales objectives by developing narratives that differentiated key capabilities, such as the firm's equity and credit research platforms and its multi-asset strategies. Collaborated with firm's asset allocation committee to produce a monthly client video on market positioning. Drafted or edited social media posts, webcast scripts, and other investment-related digital content.

#### Vice President & Senior Financial Writer

September 1998 - June 2008

Employer: Smith Barney Consulting Group, Wilmington, DE

Writer, editor and project manager for a leading investment consulting organization. Researched and wrote white papers on advanced investment topics for both the institutional and wealth markets. Produced quarterly client newsletter and quarterly reports on the U.S. and global capital markets. Created capability brochures, pitch books, sales decks and other marketing materials for separately managed accounts, mutual funds, and ETFs. Developed multimedia content for the firm's web page.

#### Senior Vice President

July 1997 - September 1998

TransAtlantic Futures Inc., Washington, DC

Media relations manager for a boutique consulting firm specializing in economic communications. Advised European economists and financial executives on their interviews, speeches and articles in the U.S. media market. Ghost wrote or edited op-ed articles and presentations on economic and financial topics. Article placements included *The Wall Street Journal*, *The New York Times*, *Le Monde*, and *The Los Angeles Times*. Developed digital investment-related content for the firm's web page.

#### Financial Reporter

August 1990 - July 1997

Employer: *USA Today*, Arlington, VA

Financial1 correspondent for a U.S. national daily newspaper. Served as senior economics reporter, covering the Federal Reserve, U.S. Treasury, international monetary and trade policy, and other macroeconomic issues.

JOURNALISM AWARDS: Winner, National Press Club Consumer Journalism Awards  
Finalist, UCLA Loeb Awards for Business Journalism`

PAST FREELANCE CLIENTS: American Bar Association, *Financial Times*, National Bureau of Economic Research, U.S. Chamber of Commerce, World Economic Forum

REGISTRATIONS: FINRA Series 7 General Securities Representative (inactive)

### EDUCATION

The Evergreen State College, Olympia WA  
Degree: Bachelor the Arts