

Biography: Bill L. Booz III, CFP®

Architect of Total Return Life™

From Wall Street to wilderness trails, Bill Booz has redefined success by measuring wealth not in portfolios, but in purpose. A visionary investment manager, storyteller, and modern-day explorer, Bill's life is a tapestry of calculated risks and soul-stirring adventures—proof that money, when mastered, can fuel freedom rather than imprison it.



Born in New Jersey and armed with a magna cum laude finance degree from Rutgers, Bill's early years followed a conventional script—until a minor in Vietnamese (earned at the University of Wisconsin) hinted at the unconventional path ahead. After thriving in finance, he confronted a revelation: true prosperity isn't found in spreadsheets, but in the alchemy of financial stability, physical vitality, and spiritual depth. Thus, the Total Return Life™ philosophy was born—a blueprint for living where dividends fund dreams, and balance sheets make room for bucket lists.

Bill doesn't just preach this philosophy; he's its living manifesto. He traded boardrooms for backcountry, embarking on a seven-month, 2,190-mile odyssey along the Appalachian Trail—a pilgrimage that seared into him the sacred connection between grit, grace, and God's grandeur. He's summited Kilimanjaro, pedaled across five continents, and ventured to all 50 states, each journey sharpening his belief that *"Adventure is the compound interest of the soul."*

A mountain biker at heart, Bill's lens captures the raw poetry of nature and human resilience. His upcoming documentary, *Pedals of Praise* (pedalsofpraisefilm.com), chronicles his ride along North Dakota's grueling but beautiful Maah Daah Hey Trail—a meditation on surrender, where buttes and badlands become altars to the divine. As an author, he distills wisdom into works like *Seasons and Colors of the Appalachian Mountains* and the forthcoming *Total Return Life™*, urging readers to wield wealth as a tool for purpose, not luxury.

Now rooted in Arizona's desert splendor, Bill splits his days between advising clients, leading mountain bike expeditions, and overlanding through the West's untamed corners. Yet his greatest investment remains inspiring others to chase their own Total Return Life™—one where portfolios fund passions, and fulfillment outpaces fiscal returns.

In Bill's world, money isn't the endgame—it's the trailhead.

"Seek first the kingdom of God and all things shall be added onto you." Matthew 6:33