

DAVID M. THOMAS

Content Governance & Editorial Systems Leader

CMS, DAM & AI-Enabled Operations | Regulated Financial Services

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PROFESSIONAL SUMMARY

Content governance and editorial systems leader with 25+ years supporting complex, regulated financial organizations. Specializes in lifecycle governance, CMS/DAM ownership, metadata strategy, and workflow design that reduce operational risk and improve speed to market.

Works at the intersection of content, compliance, and technology, ensuring approved content is structured, reusable, auditable, and aligned to enterprise standards.

Experienced in aligning Legal, Compliance, Product, UX, and executive stakeholders around shared governance models; building durable content systems; and delivering under review-intensive conditions.

EDUCATION

- M.A. Communications — West Chester University of Pennsylvania
- B.A. Communications — West Chester University of Pennsylvania

LICENSES, CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

- CFA Institute — Investment Foundations Certificate (2025)
- FINRA Series 6 & Series 63 — Passed; not registered in a rep capacity
- Google AI Essentials
- Google UX Design Foundations
- HubSpot — Content Marketing, Digital Marketing, Email Marketing, Inbound Marketing, SEO
- Meta Marketing Analytics Foundation
- NIH Plain Language Certificate
- Packt — Governance, Risk, and Compliance (GRC) Fundamentals
- ACES: The Society for Editing — Member

PROFESSIONAL EXPERIENCE

Vanguard — RED: In-House Creative Agency (Malvern, PA)

Editorial Director & Content Manager | 2017–2024

- Managed a 20-person editorial team producing regulated financial content across digital, advisor, and executive channels.
- Owned governance standards across CMS environments, including lifecycle stages, naming conventions, version control, approval workflows, and retention practices for regulated marketing and client communications.
- Delivered near-zero error rates under FINRA/SEC oversight; ensured accuracy, consistency, and compliance for high-visibility content.
- Established metadata and taxonomy discipline to improve content findability, reuse, and cross-channel consistency across digital platforms.
- Designed AI-assisted editorial workflows with human-in-the-loop controls, escalation thresholds, and documented failure modes for regulated content; projected \$2M cost savings (FY25) and improved scalability, velocity, and consistency across content operations.
- Embedded compliance, usage-rights, and disclosure controls directly into publishing workflows to reduce review-cycle friction and operational risk.

- Partnered with Legal, Compliance, Product, PR, UX, and Digital to unify voice, reduce review-cycle friction, and improve content quality.
- Defined operational KPIs to measure governance adherence, accuracy, and content lifecycle efficiency.

TIAA (New York, NY)

Senior Copywriter | 2015–2017

- Produced urgent, regulated communications for plan sponsors during market volatility; maintained fiduciary and compliance alignment under accelerated review cycles.
- Developed advisor-facing messaging on market implications, product impacts, and retirement plan considerations.
- Supported digital UX content that improved participant decision-making during volatility and plan transitions.

Morgan Stanley (Denver, CO)

Internal Advisor Education & Intranet Content Specialist | 2013–2015

- Advisor-enablement communications and instructional content for enterprise digital systems.
- Structured editorial QA ensuring accuracy and consistency across regulated operations.

Deloitte (Glen Mills, PA)

Associate Knowledge Manager | 2008–2013

- Led global knowledge-system governance and metadata standards across enterprise repositories.
- Partnered with Legal and Compliance on risk-aligned documentation controls.
- Established taxonomy structures and content classification standards to support enterprise search, reuse, and policy compliance.

Voya (Frazer, PA)

Field Marketing Communications Writer (Northeast Region) | 1999–2006

- Advisor-facing field support across NE corridor
- On-site and regional marketing enablement
- Regulated communications, campaign execution, advisor adoption.

CORE SKILLS

Regulated Finance & Governance

FINRA/SEC alignment • Risk literacy • Lifecycle governance • Editorial QA • Plain language • Accessibility (WCAG)

Editorial Systems & Operations

CMS administration • DAM governance • Metadata & taxonomy strategy • Workflow design • Version control • Approval architecture • Retention practices

AI-Enabled Editorial Operations

Human-in-the-loop workflows • AI policy & guardrails • Retrieval-ready content structuring • Automation & taxonomy alignment