

DAVID M. THOMAS

Senior Financial Writer | Investment Content Strategist

Investment Markets • Portfolio Strategy • Retirement • Wealth Management • Regulated Financial Content
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PROFESSIONAL SUMMARY

Senior financial writer and editorial strategist with 25+ years of experience translating complex investment, retirement, and financial concepts for investors, advisors, and institutional audiences. Experience spans SEI, Vanguard, TIAA, and Morgan Stanley, with expertise in investment analysis, portfolio construction, retirement systems, wealth management, and regulated communications. Develops quantitative and narrative content across market commentary, thought leadership, advisor communications, and financial media, combining investment research, editorial judgment, data analysis, and emerging AI-enabled workflows.

PROFESSIONAL EXPERIENCE

SEI - Financial Writer 2026–present

- Develop quantitative and narrative investment content spanning market and economic commentary, geopolitics, portfolio construction, asset allocation, thought leadership, and advisor communications.
- Translate investment research, market data, and complex financial concepts into clear, analytically grounded narratives for advisor, intermediary, and client audiences.
- Partner with investment professionals, strategists, product teams, and other subject-matter experts to develop and refine investment perspectives across digital, presentation, and client-facing formats.
- Apply data analysis and forecasting inputs to support market narratives and investment communications, connecting quantitative findings with broader portfolio and economic context.
- Integrate generative and agentic AI into research, editorial, and content-production workflows while maintaining accuracy, editorial judgment, and compliance-sensitive standards.
- Contribute to the evolution of editorial systems and scalable content workflows across content management, digital publishing, and presentation environments.

Yahoo Finance - Financial Writer (Freelance Contributor) 2026–present

- Contribute long-form financial journalism and educational content to Yahoo Finance, with 17 published articles across investing, retirement, precious metals, consumer finance, and financial decision-making.
- Develop 800–1,300-word articles that explain investment products, market dynamics, portfolio considerations, tax and regulatory frameworks, credit systems, and retirement strategies for a broad consumer audience.
- Research and translate complex financial mechanics—including investment structures, pricing drivers, risk, liquidity, taxation, and regulatory requirements—into accessible, reader-focused explanations.
- Build interconnected topic clusters designed to provide progressive coverage of complex financial subjects while supporting editorial consistency, search visibility, and reader understanding.
- Apply primary-source research, financial data, and regulatory guidance to produce accurate, neutral content within compliance-sensitive subject areas.

Vanguard - Editorial Director 2017–2025

- Led editorial production for digital, advisor, and executive communications within Vanguard's in-house creative agency.
- Managed a 20-person team producing regulated financial content across investor and advisor platforms.
- Translated investment and retirement concepts into clear investor communications.

- Maintained near-zero error rates under FINRA/SEC oversight.
- Partnered with product, UX, legal, and compliance teams to ensure accurate, compliant messaging.

TIAA - Senior Copywriter **2015–2017**

- Produced regulated communications for plan sponsors during market volatility.
- Developed advisor messaging on market impacts and retirement planning considerations.
- Supported UX content improving participant decision-making during plan transitions.

Morgan Stanley - Advisor Communications & Content Specialist **2013–2015**

- Produced advisor-enablement and instructional content for enterprise financial systems.
- Performed editorial QA ensuring accuracy across regulated communications.

Deloitte - Associate Knowledge Manager **2008–2013**

- Managed knowledge-system governance and metadata standards across enterprise repositories.
- Partnered with legal and compliance on documentation controls and taxonomy standards.

Voya - Marketing Communications Writer **1999–2006**

- Advisor-facing marketing and field communications across the Northeast region.
- Supported campaigns, advisor enablement, and regulated communications.

CORE SKILLS

Financial & Investment Content: Financial markets • Investment analysis • Portfolio construction • Asset allocation • Retirement systems • Wealth management • Consumer finance • Investor education

Editorial: Financial research • Developmental editing • Copyediting • Plain language • Thought leadership • Data-driven storytelling

Regulated Communications: FINRA/SEC alignment • Disclosure language • Compliance collaboration • Primary-source research • Accessibility (WCAG)

Content & AI Systems: CMS • Editorial workflow systems • Metadata strategy • Generative AI • Agentic AI • AI-assisted research and editorial workflows • Data analysis

CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

- CFA Institute — Investment Foundations
- FINRA Series 6 & 63
- Google AI Essentials | Google UX Design
- HubSpot Content, Digital, Email, Inbound, SEO
- Meta Marketing Analytics | NIH Plain Language
- Packt — Governance, Risk & Compliance
- ACES: Society for Editing

EDUCATION

- M.A., Communications — West Chester University
- B.A., Communications — West Chester University