DAVID M. THOMAS
Financial Writer & Editorial Lead
Retirement • Wealth Management • Consumer Finance • Regulated Financial Content
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PROFESSIONAL SUMMARY

Financial writer and editorial leader with 25+ years of experience translating complex financial topics and investment topics for investors, advisors, and institutional audiences. Background includes Vanguard, TIAA, and Morgan Stanley, specializing in retirement systems, wealth management, consumer finance, and regulated communications. Produces clear, accurate financial content across digital platforms, advisor communications, and financial media while operating in compliance-sensitive environments.

PROFESSIONAL EXPERIENCE

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

- Contribute to Yahoo Finance editorial coverage across consumer finance and retirement topic clusters.
- Write long-form financial articles (800–1,200 words) covering investment strategy, credit systems, and financial decision-making.
- Translate complex financial mechanics into clear, reader-focused explanations.

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 Writing
Financial markets • Retirement systems • Wealth management • Consumer finance • Investor education

Editorial
Developmental editing • Copyediting • Proofreading • Plain language

Regulated Communications
FINRA/SEC alignment • Disclosure language • Compliance collaboration • Accessibility (WCAG)

Content Systems
CMS • Workflow systems • Metadata strategy • AI-assisted editorial tools

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