

DAVID M. THOMAS

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dave-thomas-content.com

SENIOR FINANCIAL WRITER | CONTENT STRATEGIST | EDITORIAL DIRECTOR

Senior writer and leader with 20+ years of experience translating complex concepts into accessible, actionable content. Google AI Essentials and HubSpot Content Marketing certified professional who bridges traditional editorial rigor with AI-enabled, omnichannel strategy. Skilled in executive, advisor, and client communications within FINRA/SEC-regulated environments, partnering across product, compliance, and digital to deliver clarity, trust, and measurable engagement at scale.

EDUCATION

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

CERTIFICATIONS, LICENSES, AND AFFILIATIONS

- Google: AI Essentials Certification
- HubSpot Academy: Content Marketing Certification
- NIH: Plain Language Writing Certification
- FINRA Series 6 and 63
- ACES: The Society for Editing
- Editorial Freelancers Association
- Association of National Advertisers

AWARDS

- Gramercy Institute award (Vanguard Personal Investing)
- IHAF In-House Agency of the Year finalist (RED @ Vanguard)
- Grand Stevie Award: Most Honored Marketing Agency of the Year (RED @ Vanguard)
- IFCA Best in Show award: Long-form content/article
- IFCA Best in Show award: Short-form sales enablement

PORTFOLIO

dave-thomas-content.com

PROFESSIONAL EXPERIENCE

Vanguard (RED: in-house creative agency) (Malvern, PA)

Editorial Director | 2017–2024

- Led a 20-person editorial team delivering regulated financial content (800+ pages monthly) across digital and executive channels—maintaining a <1% error rate under strict oversight.
- Functioned as both editor-in-chief and writer, crafting thought leadership, advisor/client communications, and C-suite webcasts with measurable engagement lift.
- Built AI-enabled editorial workflows that improved consistency, accelerated delivery, and cut projected costs by \$2M (FY25)—a model for enterprise content operations.
- Collaborated cross-functionally with product owners, PR, compliance, sales enablement, and digital to align voice and strategy across campaigns.
- Served as lead writer during live investor “power hours” on social platforms—distilling macroeconomic insights into clear, brand-safe responses in real time.
- Integrated SEO, inbound, and analytics insights—drawing on HubSpot-certified methodologies—to optimize content performance and audience conversion.
- Developed voice/tone governance frameworks, mentoring 20+ editors and writers to sustain enterprise-wide storytelling standards.

TIAA (New York, NY)

Senior Copywriter | 2015–2017

- Served as lead writer during market volatility periods, delivering urgent communications to plan sponsors to maintain confidence and meet fiduciary and compliance expectations.
- Produced structured messaging around clawback and recoupment provisions, mitigating reputational and regulatory risk.
- Developed advisor-facing content translating market movement and product implications into clear guidance.
- Strengthened plan sponsor communications under accelerated deadlines and review cycles.

Morgan Stanley (Denver, CO)

Senior Copywriter | 2013–2015

- Created instructional and process documentation supporting enterprise systems and advisor enablement.
- Partnered with SMEs to simplify complex operational and digital workflows into accessible user content.

Deloitte (Glen Mills, PA)

Associate Knowledge Manager | 2008–2013

- Owned large-scale content migration and knowledge governance for global platforms, including SharePoint.
- Developed editorial QA practices for software documentation, product transformations, and compliance-reviewed content.
- Partnered with Legal, HR, and Compliance to ensure accuracy, consistency, and risk alignment.

Voya (formerly ING Life & Annuity Insurance Company) (Frazer, PA)

Senior Marketing Communications Specialist | 1999–2006

- Developed advisor and B2B cross-channel content for annuity and insurance campaigns.
- Managed M&A messaging in partnership with executive leadership.
- Ghostwrote communications for C-suite leaders, preserving voice integrity while driving clarity.

SKILLS AND TOOLS

- Financial storytelling and advisor/client communications
- Brand voice development and tone governance
- Cross-channel writing: digital, social, internal, executive
- Content performance optimization (SEO/analytics collaboration)
- Inbound content strategy and campaign optimization (HubSpot-certified)
- Regulated content experience (FINRA/SEC)
- Cross-functional stakeholder alignment
- Editorial operations: QA, style, compliance, and plain language governance (NIH certified)
- Knowledge management / migration / taxonomy
- AI-enabled editorial workflows and governance
- UX/design collaboration (Figma, journey mapping)
- Tools: Workfront, SharePoint, Jira, Workday
- Style guides: *Chicago Manual of Style* (expert), *AP* (expert)