

DAVID M. THOMAS

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Editorial & Content Strategy Director | Creative Director

FINANCIAL STORYTELLING | HUMAN-CENTERED VOICE | AI-ENABLED CONTENT OPS

Editorial and creative director with deep experience translating financial complexity into clear, compliant content across regulated environments. Lead enterprise-scale editorial operations and build AI-enabled workflows that deliver accurate, consistent, brand-aligned communications. Skilled in financial storytelling, content strategy, executive ghostwriting, SEO, inbound marketing, UX collaboration, and content governance. Proven ability to improve efficiency and accuracy through analytics and AI, including 50% faster output, 90% tonal alignment, and 50% fewer revision cycles.

EDUCATION

M.A. Communications, West Chester University of Pennsylvania

B.A. Communications, West Chester University of Pennsylvania

CERTIFICATIONS & PROFESSIONAL DEVELOPMENT

CFA Institute Investment Foundations (in progress)

Google AI Essentials

Meta Marketing Analytics Foundation

HubSpot Content, Digital, Email & Inbound Marketing; SEO & UX Foundations

Google Analytics 4 (in progress)

Association of National Advertisers (ANA)

NIH Plain Language

ACES: The Society for Editing

FINRA Series 6 & 63

Editorial Freelancers Association (EFA)

AWARDS

Insurance & Financial Communications Association (IFCA) 2x best-in-show awards

Gramercy Institute award (Vanguard Personal Investing)

IHAF In-House Agency of the Year finalist (RED @ Vanguard)

Grand Stevie Award: Marketing Agency of the Year (RED @ Vanguard)

PROFESSIONAL EXPERIENCE

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

Editorial Director & Content Manager | 2017–2024

- Managed a 20-person editorial team producing 800+ pages of regulated financial content monthly across digital, advisor, and executive channels.
- Delivered near-zero error rates under FINRA/SEC oversight; ensured accuracy, consistency, and compliance for high-visibility content.
- Served as editor-in-chief and lead writer for executive messaging, thought leadership, advisor/client communications, and C-suite webcast scripts with measurable engagement lift.
- Built AI-enabled, human-in-the-loop editorial workflows and governance models; projected \$2M cost savings (FY25) and improved scalability, velocity, and consistency across content operations.
- Mapped client lifecycle stages and aligned content to friction points, improving clarity, engagement, and conversion across high-stakes communications.
- Partnered with Product, PR, Compliance, Sales Enablement, UX, and Digital to unify voice, reduce review cycles, and improve content quality.
- Applied SEO, inbound, and analytics methodologies to improve content performance and collaborated with UX/Product on content patterns and Figma-based reviews to improve experience consistency.
- Acted as primary live writer during investor “power hours,” converting real-time macroeconomic insight into brand-safe responses that drove measurable MQL activity and average ROI of \$3M per session.
- Created enterprise voice and tone frameworks; mentored writers, strengthened editorial governance, and improved cross-channel cohesion.

TIAA (New York, NY)

Senior Copywriter | 2015–2017

- Produced urgent and 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.
- Created structured communications for clawback/recoupment provisions, reducing reputational and regulatory risk.
- Strengthened clarity, accuracy, and timeliness across plan sponsor communications, including digital UX content supporting participant decision-making during volatility and plan transitions.

Morgan Stanley (Denver, CO)

Senior Copywriter | 2013–2015

- Created instructional, process, and advisory documentation supporting enterprise systems and advisor enablement.
- Partnered with SMEs to simplify complex operational and digital workflows across distributed teams.
- Ensured content compliance, accuracy, and consistency through structured editorial QA.

Deloitte (Glen Mills, PA)

Associate Knowledge Manager | 2008–2013

- Led content design and governance for global SharePoint ecosystems, partnering with Legal, Compliance, IT, and HR to shape metadata, version control, and editorial QA frameworks in alignment with risk and operational requirements.
- Partnered with global Content Ops teams to scale knowledge workflows across channels and regions.
- Developed editorial QA practices for software documentation, transformation initiatives, and compliance-reviewed content.
- Partnered with Legal, HR, and Compliance to ensure risk alignment, version control, accuracy, and content lifecycle governance.
- Improved findability and user experience through structured knowledge management methodologies.

Voya (Frazer, PA)

Senior Marketing Communications Specialist | 1999–2006

- Developed advisor and B2B content for annuity and insurance product campaigns across print and digital channels.
- Managed M&A communication strategies with executive leadership.
- Ghostwrote C-suite communications to strengthen clarity, alignment, and tone consistency.
- Supported cross-channel marketing efforts for distribution and advisor communications.

CORE SKILLS & CAPABILITIES

Content Strategy & Leadership: Editorial direction, messaging strategy, narrative development, brand voice governance, human-centered storytelling, UX content strategy and experience design alignment

Editorial Operations: Compliance (FINRA/SEC), QA, accuracy controls, accessibility/plain language, high-volume production

Marketing & Performance: SEO, inbound strategy, lifecycle content, funnel alignment, GA4, paid social insights (Meta), analytics-driven optimization

AI & Innovation: AI-enabled workflows, governance frameworks, human-in-the-loop systems, automation, taxonomy, content systems thinking

Tools & Systems: Workfront, Jira, SharePoint, HubSpot CRM/CMS, GA4, Figma, Meta Ads Manager, Google Workspace, Gemini, ChatGPT 5.1