



MICHAEL DAVIS

FINANCIAL AND TRADING ADVISER

CONTACT

☎ +19294580324

✉ michael.davis@plancorp.investments

📍 New York 575 Madison Ave
World-Wide Business Center

EDUCATION

2002-2004

**NEW YORK UNIVERSITY STERN
SCHOOL OF BUSINESS**

2004-2006

**THE UNIVERSITY OF NEW YORK
AT BUFFALO SCHOOL OF
MANAGEMENT**

SKILLS

- Key Skills
- Financial Planning & Strategy
- Development
- Investment Portfolio
- Management
- Client Relationship Management
- Risk Assessment & Mitigation
- Retirement & Estate Planning
- Tax Optimization Strategies
- Financial Analysis & Forecasting
- Regulatory Compliance
- Business Development

LANGUAGES

- English (Fluent)
- French (Basics)

PROFILE

A results-driven financial adviser with over 8 years of professional experience providing tailored financial planning and investment strategies. Skilled in fostering client relationships, analyzing complex financial data, and delivering actionable insights to help clients achieve their financial goals. Adept at navigating dynamic market conditions, leveraging opportunities, and maintaining a track record of consistent performance and client satisfaction.

WORK EXPERIENCE

2016-2018

MERRILL LYNCH PROFESSIONAL CLEARING CORP.

- Develop and execute comprehensive marketing strategies and campaigns that align with the company's goals and objectives.
- Lead, mentor, and manage a high-performing marketing team, fostering a collaborative and results-driven work environment.
- Monitor brand consistency across marketing channels and materials.

2018- 2019

MERRILL LYNCH, PIERCE, FENNER & SMITH INCORPORATED

- Create and manage the marketing budget, ensuring efficient allocation of resources and optimizing ROI.
- Oversee market research to identify emerging trends, customer needs, and competitor strategies.
- Monitor brand consistency across marketing channels and materials.

2020-2023

MERRILL LYNCH, PIERCE, FENNER & SMITH INCORPORATED

- Develop and maintain strong relationships with partners, agencies, and vendors to support marketing initiatives.
- Monitor and maintain brand consistency across all marketing channels and materials.

I have extensive experience in trading, with a focus on analyzing market trends and executing strategic trades across various asset classes, including equities, bonds, and cryptocurrencies. I've successfully navigated volatile markets by applying risk management techniques and leveraging data-driven insights.