

Steven Dale Davison

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Communications – Finance

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PROFILE

Creative and productive writer/editor with knowledge of the financial industry and experience in financial product development and data analysis; former Merrill Lynch employee.

- ✧ Four years experience writing in the financial industry, including two years at Merrill Lynch.
- ✧ Experience leading a creative communications team, designing and writing marketing collateral of all kinds.
- ✧ Experience researching and digesting financial and economic theory and news.
- ✧ Experience conducting fundamentals research and portfolio performance analysis for monthly performance reports.

Singular Accomplishments

- ✧ Contributed significantly to the content, design and technical implementation of two Merrill Lynch products and one hedge fund product.
- ✧ Helped launch a boutique investment fund; responsible for all communications, plus research & performance reporting.
- ✧ Led a marketing team in all aspects of corporate communications—content and design of all web, digital and print media (including catalogs and webmaster), plus business development & strategy.
- ✧ Launched three communications platforms from scratch and one from cold ash.

EXPERIENCE

Financial Writing

Broad experience; talent for expressing ideas and data clearly.

- ✧ *Communications*—launched the communications platform for a boutique investment fund, including design and content of corporate identity pieces, performance reports and white papers (Trilogy Capital Management).
- ✧ *Industry overviews*—wrote reports on economic performance and forecasts, trends, competition, and technology developments in more than 30 industries, for Merrill Lynch's Business Financial Planner product.
- ✧ *Portfolio performance*—conducted fundamentals and risk/return research, analysis and commentary; designed and wrote monthly performance reports; advanced skills in Excel (Trilogy).
- ✧ *Vendor management*—managed relationships with printers and other vendors, including oversight of press production.

Financial Product Development

Contributed significantly to three financial products.

- ✧ *Educational materials*—wrote the design and construction document for a proprietary technical trading system, explaining how the system worked; co-wrote white papers for publication in journals and investor education (Trilogy Capital Management).
- ✧ *Document development*—managed document development in coordination with managers & analysts, outside consultants, and programmers for Merrill Lynch's Nonprofit Financial Planner (NFP); edited final product for legal compliance and launch. Wrote Industry Overview text modules (Merrill Lynch Business Financial Planner–BFP).

EXPERIENCE
continued

Marketing

Experience managing a creative team. Creative, productive and collaborative.

- ✦ *Head of marketing*—led the team that designed and wrote all marketing communications for a high-end speakers bureau, including hundreds of web pages and print brochures, four catalogs and dozens of other related collateral.
- ✦ *Advisory services business development*—launched the communications platform for an advisory services business; co-designed consulting projects with clients & in-house client representatives; wrote project proposals.
- ✦ *Sales support*—served as a resource on sales strategy for a sales team.

Technical Writing

Certificate in Technical Writing, Middlesex County College, Edison, NJ.

- ✦ Wide range of professional projects: business proposals, process manuals, employee handbook, investment fund Design & Construction document, research reports.

Editing

Dedicated to providing substantive content and meeting deadlines.

- ✦ Edited a corporate magazine and three corporate newsletters. Currently edit a nonprofit newsletter. Helped clients develop book proposals.

**AWARDS &
ACCOMPLISHMENTS**

- ✦ Certificate in Web Design & Development, Rutgers University, Institute for Management and Executive Development, Camden, NJ.
- ✦ Technical Writing Certificate, Middlesex County College Center for Continuing Education, Edison NJ.
- ✦ Edward Tufte seminar—Visual Evidence Design.
- ✦ Albert Cope Scholarship, Pendle Hill, Media PA.
- ✦ Patrick D. Henry Writing Scholar, Earlham [Graduate] School of Religion, Richmond IN.

TECHNOLOGY

Microsoft Office suite—advanced skill level. | HTML, CSS, Dreamweaver, Flash.
Design—Adobe Creative Suite CS4 & Quark; advanced skill level, Adobe InDesign.

**COMMUNITY
WORK**

Former trustee, Sourland Planning Council (nonprofit).
Former member, Advisory Committee, American Indian Program, Cornell University.

EMPLOYERS

Consulting – Communications for startups	2009 – present	Various clients
W. Colston Leigh, Inc. – Head of Marketing	2000 – 2009	Speakers bureau
Trilogy Capital Management – Communications	1998 – 2000	Investment fund
Merrill Lynch – Senior Specialist	1996 – 1998	Research writer
Freelance writer and journalist	1986 – 1991	Newspapers & magazines

EDUCATION

BA, Rutgers the State University of New Jersey.