Dr. Erik Davidson, CFA, CTFA

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Academic Degrees

Doctorate in Business Administration (DBA) – Behavioral Finance, DePaul University Kellstadt Graduate School of Business

Master of Business Administration (MBA) – Finance, UCLA Anderson School of Management

Bachelor of Arts (BA) – Economics, St. Olaf College

Certifications

Chartered Financial Analyst (CFA)

Certified Trust and Fiduciary Advisor (CTFA)

Biography

Dr. Erik Davidson, CFA, CTFA is an Assistant Professor (Clinical) of Finance at Baylor University. Additionally, he serves as the Chief Economic Advisor for Inspire Investing as well as an Instructor and Curriculum Consultant for the American Bankers Association (ABA). He provides subject matter expert consulting on wealth and investment management matters as well as behavioral finance topics.

Prior to embarking on his second career in academia, Dr. Davidson had a 35-year career in financial services. In 2019, he retired from Wells Fargo Private Bank where he had spent 15 years in various investment leadership roles. His tenure there culminated as the Chief Investment Officer (CIO) where he led an investment team of more than 400 professionals who managed more than $200 billion. As CIO, he oversaw the research, equity, fixed-income, alternatives, real assets, portfolio management, investment product, as well as the investment tools and analytics teams. In this role, he served as a mentor to many diverse team members in their career journeys.

Prior to Wells Fargo, Dr. Davidson was the co-Founder and co-CEO of Separate Account Solutions, Inc., a technology company that provided separately managed account (SMA) tools and operational services to investment firms. Earlier in his career, he led the portfolio management team for Franklin Templeton Private Client Services and was a bond trading manager for Credit Suisse First Boston in both New York City and Tokyo. His lifelong interest in the application of academic theory to investing was formed early in his career when he worked for Dimensional Fund Advisors.

Dr. Davidson's academic research has focused primarily on topics in the growing field of behavioral finance. His doctoral dissertation was "Investment Choice Architecture in the Age of Robo-Advisors". His joint paper, "Does Investor Sentiment Affect Market Response to Earnings Restatements?", was accepted for presentation at the 2018 Queen Mary University of London's Behavioural Finance Working Group Conference. Davidson is the co-author of *Investing in Separate Accounts* and contributing co-author of *The E-Finance Report*, both books were published by McGraw-Hill. He has authored numerous investment-related articles, presented to thousands at hundreds of investor events, and has been a regularly featured commentator in the media including television (CNBC, Bloomberg, Fox Business, and others), radio and podcast (Bloomberg, Wharton Business, and others), and print (Wall Street Journal, New York Times, Barron's, Bloomberg, Reuters, Associated Press, and others).

Additionally, Dr. Davidson is a member of the Advisory Board for DePaul University's Driehaus Center for Behavioral Finance as well as for the *Journal of Impact and ESG Investing*, a Mensa member, an Eagle Scout, a foster care provider, and an active volunteer in his local church and community.