



## Erik Davidson, CFA®

*Deputy Chief Investment Officer  
Wells Fargo Bank, N.A.*

Erik Davidson is an Executive Vice President and the Deputy Chief Investment Officer for Wells Fargo Private Bank. Mr. Davidson leads the national investment team offering high net worth individuals a customized, comprehensive approach to portfolio management. In addition, the investment team provides clients access to four other key Wealth Management (WM) services—private banking, trust, estate, and financial planning. Further, he is a standing member of WM’s Investment Policy Committee, Due Diligence Committee and the firm’s Asset Allocation Committee.

Mr. Davidson has more than 20 years of experience in the financial services industry and joined Wells Fargo in 2004. Early in his career, he worked for Credit Suisse First Boston in New York and Tokyo. During that time, he had various assignments, including overseeing trading of mortgage and asset-backed securities in Asia. After returning to the United States, he was a Managing Director for Franklin Templeton Private Client Services where he led the portfolio management team. In 2000, he co-founded a company which provided separate account technology and operational solutions to financial services firms.

Mr. Davidson is a published writer and frequent speaker. He is well known for his passion to bring relevancy and clarity to complicated economic and market subjects. He is the co-author of *Investing in Separate Accounts* and contributing co-author of *The E-Finance Report* (both published by McGraw-Hill). In addition, he writes numerous investment-related articles, speaks at many investment-industry conferences, and is often featured in the media (incl. Wall Street Journal, New York Times, Forbes, SmartMoney, TheStreet, CNBC, The Washington Post, Fox Business News and Dow Jones MarketWatch).

Mr. Davidson is a Chartered Financial Analyst. He holds a degree in Economics from St. Olaf College and an MBA in Finance from UCLA-Anderson School of Management. He was a committee chair and board director for the CFA Society of Colorado. Further, he was a Director for Young Americans Bank and the Young Americans Center for Financial Education and is a past member of the Rocky Mountain Community Foundation’s Investment Committee. He is a member of Mensa and is actively involved in his local community.

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