David W. McCary, CFP®, CPWA®, CRI®, MBA

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Summary

Institutionally trained investment professional and financial planning fiduciary. Specializes in comprehensive, fee-only financial planning, investment advising and multi-generational wealth management. Also experienced in early-stage venture capital and commercial real estate investing. Strong client management and relationship skills. Strong analytical and technology skills.

Professional Experience

Founder / Managing Member 2020 to Present
McCary Anheuser Wealth Management, LLC, West Hartford, CT
Registered Investment Advisor virtually serving clients nationwide

- As a fiduciary, offer high net worth clients fee-only financial planning, investment advising, protection planning, multi-generational estate planning and other virtual family office services.

Co-founder / Principal 2013 to Present
Duxford Capital Advisors, LLC, West Hartford, CT
Venture capital investment firm focused on tech, healthcare, and energy industries

- Reviewed over 100 early-stage companies; current portfolio comprises seven companies.
- Manage company's investment due diligence process, banking and accounting affairs.

Co-founder / Lead Advisor 2001 to Present
Anheuser Family Virtual Family Office
Ultra high net worth virtual family office

- Identified opportunity to create virtual family office for family with fifth generation inherited assets.
- Assembled and currently act as Lead Advisor on team of private bankers, trust officers, investment advisors, and estate lawyers.
- Currently manage team to minimize estate taxes, cover all grantor's living expenses, and implement inheritor, educational and philanthropic trusts.
- Developed investment portfolio strategy that successfully navigated great recession (with no realized principal loss) and has performed to benchmarks while minimizing investment fees.

Financial Associate with the Capitol Region Group (3 yrs) 2017 to 2019
Thrivent Investment Management, Inc., West Hartford, CT
Fortune 500 faith-based, not-for-profit managing $100+billion for 2 million clients

- As a fiduciary offered high net worth clients fee-based financial planning, investment advising, protection planning, multi-generational estate planning services.

Co-founder / President (16 yrs) 1993 to 2009
McCary Stevens Associates, Inc., Avon, CT
Institutional Investment Advisor focused on commercial mortgage-backed securities

- Managed company team and underwrote $113 billion of commercial mortgage loan principal over approximately 7,500 properties (multifamily, office, retail, industrial, hotel, self-storage, and healthcare) in most U.S. markets including Alaska and Hawaii. Clients included JP Morgan, Wells Fargo, UBS, ING-Clarion, Allied Capital, and American Capital.

Other Relevant Employment:

Assistant Portfolio Manager / Commercial Mortgage Loan Officer (6 yrs) 1987 to 1993
Aetna Realty Investors, Inc. Hartford, CT
Investment advisory firm focused on commercial real estate

- Invested pension clients' money in commercial real estate properties nationwide.
- Invested Aetna Life Insurance's general account money in commercial mortgage loans nationwide.

Private Banking Loan Officer (5 yrs)
Manufacturers Hanover Trust, New York, NY 1980 to 1985
Commercial bank (merged into JP Morgan)

- Provided private banking loans and investment advisory services to high-net-worth clients.
- Cross-sold other commercial bank products and services.

Education, Certifications, Trustee Investment Committees

MBA Finance, Tuck School of Business, Dartmouth College, Hanover, NH	1987
BA Economics, Middlebury College, Middlebury, VT	1980

Certifications / licenses:

CPWA® Professional	2022
CFP® Professional	2019
FINRA Series 65 – Uniform Investment Adviser	2015
CRI® Society Founding Member (Chartered Realty Investor)	2005
CFA® Society Member (Level 1)	1993

Trustee positions on Investment Committees managing $140M+:

Trustee member – Connecticut Historical Society Museum	2022
Vestry member - St Johns Episcopal Church, West Hartford, CT	2022
Trustee member - Colt Family Endowment	2020
Trustee member - Episcopal Bishop of Connecticut Endowment	2018
Trustee member - University of Hartford Art School Endowment	2017

Financial advisory trade group memberships:

NAPFA (National Association of Personal Financial Planners)	2020
XYPN (XY Planning Network)	2019
FPA (Financial Planners Association)	2018

Other memberships:

Canton Artists Guild (nature photographer)	2022
West Hartford Art League – Elected Artist (nature photographer)	2017
AOPA (Aircraft Owners and Pilots Association)	1982
PSIA (Professional Ski Instructors of America)	1980