David W. McCary, CFP®, CRI®, MBA

30 Ledyard Road • West Hartford, CT, 06117
860-573-1482 • dwmccary@gmail.com • linkedin.com/in/davidmccary

Summary

Institutionally trained investment professional and financial planning fiduciary. Specialize in comprehensive, fee-only financial planning, investment advising and multi-generational estate planning. Also experienced in early-stage venture capital and commercial real estate investing and financing. 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.

Founder / Managing Member 2001 to Present
David W McCary, LLC, West Hartford, CT
Ultra high net worth virtual single-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.
- 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., Hartford, CT
Institutional Investment Advisor focused on commercial mortgage-backed securities.

- Identified need for commercial mortgage underwriting and valuation skills in newly developing CMBS fixed income market, which, over 15 years, grew to a $500 billion market.
- Recruited 10 full-time and 8 part time commercial mortgage underwriting professionals to pursue opportunity and provide mortgage origination and underwriting services to institutional clients.
- 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, Citibank Alternative Assets, Wells Fargo, UBS, ING-Clarion, Allied Capital, Greenwich 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 ultra high net worth clients nationwide.
- Cross-sold other commercial bank products and services.

Education and Professional Associations

MBA Finance, Tuck School of Business, Dartmouth College, Hanover, NH	1987
BA Economics, Middlebury College, Middlebury, VT	1980
FINRA Series 65 – Uniform Investment Adviser	2015
CFP® Certificant	2019
CRI® Society Founding Member (Chartered Realty Investor)	2005
CFA® Society Member (Level 1)	1993
NAPFA (National Association of Personal Financial Planners)	2020
FPA (Financial Planners Association)	2018
XYPN (XY Planning Network)	2019
ACP (Alliance of Comprehensive Planners)	2020
West Hartford Art League – Elected Artist (photography)	2017
AOPA (Aircraft Owners and Pilots Association)	1982
PSIA (Professional Ski Instructors of America)	1980
PADI (Certified Basic Scuba Diver)	1972

Volunteer Experience:

Board of Trustees of the University of Hartford Art School Endowment	2017
Board of Trustees of the Colt Family Endowment	2020
Board of Trustees of the Episcopal Bishop of Connecticut Endowment	2018
Stewardship Committee of St Johns Episcopal Church	2017