

TONY DAVIDOW, CIMA®

PRESIDENT AND FOUNDER OF
T. DAVIDOW CONSULTING, LLC



Tony Davidow is President and Founder of T. Davidow Consulting, LLC, focused on helping advisors with advanced asset allocation and the use of complex strategies. Davidow also leverages his vast experience working with family offices and UHNW families, consulting with families regarding their investment philosophy and approach.

Previously, Davidow was Alternative Beta and Asset Allocation Strategist for the Schwab Center for Financial Research, where he was responsible for providing Schwab's point of view on asset allocation and portfolio construction. He was a subject matter expert on factor investing, sustainable investing, and alternative investments among other areas of expertise. He was a member of the firm's Asset Allocation Working Group and Alternative Investment Product Council.

Before joining Schwab, Davidow was Managing Director, Portfolio Strategist, and Head of the ETF Knowledge Center for Guggenheim Investments. He was responsible for developing and disseminating Guggenheim's point-of-view with clients and the media.

Before joining Guggenheim, Davidow was Executive Vice President and Head of Distribution for IndexIQ. Previously, he spent nearly 15 years at Morgan Stanley, where he served as Managing Director and Head of Sales and Training for the Consulting Services Group. While at Morgan Stanley, he was responsible for building and managing the Institutional Consulting Group and Graystone Wealth Management. Davidow began his career work for a family office.

Davidow is a frequent author and speaker at industry conferences on a range of topics, including *Asset Allocation and Manager Selection*, *The Role & Use of Alternative Investments*, and *Goals-Based Investing* among others. . He served on the board of directors of the Investments & Wealth Institute from 2009 to 2015, and currently Chairs the Editorial Advisory Board for the *Investments & Wealth Monitor*.

Davidow earned a BBA in finance and investments from Bernard M. Baruch College. He is the author of *Goals-Based Investing: A Visionary Framework for Wealth Management*, McGraw-Hill December 2021. Davidow was recognized with the prestigious *2020 Wealth Management Impact Award*, by the *Investments & Wealth Institute*, for his contributions to the industry. In 2017, he was awarded the Stephen L. Kessler Writing Award by the Investments & Wealth Institute, and in 2015, he received Honorable Distinction.