MARC-ANTHONY RICHARDSON, MBA, CPM®

Vice President, Trust Investment Portfolio Manager

SUMMARY

Dynamic and results-oriented professional with a strong business acumen and proven success in financial services and investment portfolio management. Highly skilled in supporting efficient asset allocation and risk-appropriate decision making for teams that have 8-9 figures in assets under management. Passionate about delivering asset management solutions that are competitive, pioneering, and appropriate to help others succeed.

EDUCATION

MBA
College of William & Mary | 2019-2021

BACHELOR'S DEGREE - FINANCE
Richmond University, London, UK | 2008-2012

LICENSES & SKILLS

| Professional

Chartered Portfolio Manager®

FINRA Series 7 - Securities Representative

FINRA Series 66 – Unified Combined State Law

Virginia Health, Life and Annuities Insurance

Mortgage Broker (NMLS no 1446328)

Certified Cryptocurrency Expert™

Harvard Python & JavaScript Certification

Financial Data Analytics

Corporate Accounting

WORK EXPERIENCE

Vice President, Trust Investment Portfolio Manager
Blue Ridge Bank, Trust Division, Richmond VA | 2021-Present

I lead the Asset Management team to ensure that our Trust Officers are not only making efficient and suitable investment decisions for their clients, but we are also justifying these decisions with detailed financial analysis and easy to communicate reporting strategies. My "round-table" focused structure of work is geared around ensuring that we meet and exceed regulatory standards, internal policy, and Trust document dictations as a team.

My coaching style of leadership results in a culture of communication where my associates, whether we are working remotely or in the office, can successfully collaborate and deliver timely and efficient investment reports and proposals.

- Since joining the team, I have revised our Trust service strategy to make our investment decision making more collaborative and aligned with our investment policy. My investment screeners and model portfolios are grounded in ever evolving research, and my work has yielded returns that consistently exceed expectations.
- I seek to take my experience and further grow as a leader in this industry and aid teams in setting new heights.

Premier Banker
Wells Fargo, Richmond VA / 2018-2021

Recognized as one of the top producers in the region. Cultivated strong working relationships with individuals and established businesses in the Richmond area with complex financial needs.
Developed a niche within the Business Banking Advisory Specialist team to develop long-term business development strategies with private medical practitioners (namely dentists, optometrists, and veterinarians) that were grounded in long term cash flow, investment management and legacy planning strategies.

Sr. Financial Advisor
Edward Jones, Richmond VA / 2017-2018

Built a multi-million-dollar book of business by acquiring new customers and gaining the trust of individuals with life savings and business cash flow. Specialized in Estate and Long-Term Care Planning.

Financial Advisor
Bank of America, Merrill Lynch, Richmond VA / 2016-2017

Worked in an industry leading team. Obtained FINRA licenses and established initial client base. Organized successful business outreach activities, including trade shows, dinner events, and educational programs to promote the value of working with me and how I can help them achieve their financial goals.

LINKEDIN
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