



THE OUTCOME IS INCOME®

Joshua Davison

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“It is paramount to be compassionate.”

The son of a U.S. Navy Seaman and lifelong Marine Technician, Joshua “Josh” Davison was instilled with a healthy work ethic and encouraged to pursue a wholly different career path. Fascinated by the stock market and monetary systems, Josh enrolled in college focused on personal financing and accounting, and solidified his study tract in finance. For two of his college years, Josh kept busy attending classes in the evening while he worked full time. Josh graduated with a Bachelor of Science in Business Administration with a concentration in Finance from the University of Central Florida.

Josh was offered an internship with Wachovia (now Wells Fargo), working under a Financial Advisor, where he learned the intricacies of the Broker-Dealer world.

Josh later joined Morgan Stanley as a Financial Advisor and earned his Florida insurance license, as well as his FINRA 7, 24 and 66.

Josh, determined to learn every aspect of the industry, joined Charles Schwab as a Senior Relationship Specialist in the company’s Orlando headquarters furthering his education earning his FINRA 9 and 10. Working with more than fifty independent Broker-Dealer offices as a liaison to custodial services, Josh developed more efficient methods for accomplishing important tasks and streamlining processes. Evolving his position, Josh was soon managing daily workflow for his regional team. Josh became a subject matter expert as it relates to the custody of alternative assets, and ensured Charles Schwab was prepared to adopt new products.

Relocating to Miami in 2012, Josh joined The Lubitz Financial Group; the firm was in search of a professional to oversee its investment operations, and work with custodians to systemize the department. Josh enjoyed focusing on fiduciary responsibility and the holistic approach the firm employed with its clients. Josh also appreciated building structure, creating processes and procedures, and assisting with the implementation of new technology. Josh thrived as a part of a small team that directly contributed to the growth of the firm.

Although Josh’s role at Lubitz started in back-office administration, Josh cultivated his role and purposefully immersed himself in all facets of the business to become a vital resource for the firm. Josh helped to contribute to firm growth, with the firm experiencing a sizable \$100M growth in assets-under-management.

In 2018, Josh parlayed his strong skill set into his new position with HJ Sims as Director of Investments. Josh has a keen ability to deliver information in a personalized format, enhancing the learning experience for the advisor. Josh leverages his knowledge and experience in strategy, helping facilitate growth and adoption of new platforms and products for the HJ Sims Wealth Management Group. Josh serves as a consultant for the firm’s Managing Directors and financial advisory group, assisting with asset allocation; product research and understanding; client profile analysis; new technology platforms; and firm proprietary investment models.

Joshua Davison – *continued*



In addition to his responsibility at HJ Sims, Josh gives his time to many charitable organizations. Josh believes in remaining selfless and giving back to the community in which he lives. Josh has helped to raise awareness for men's health for the past nine years through the Movember Foundation. Josh and his wife support the ASPCA, helping animals via volunteer work and donations. Josh participates on the Alzheimer Association's board as many generations of his family have been affected by this disease.

Josh and his wife have one daughter and a Turkish Angora cat named Pinot. Outside of work, Josh leads a fit, active lifestyle – exercising, eating smart, and inspiring others to live healthier. Josh is an avid boater (30+ years), and enjoys the beach, fishing, and entertaining – his daughter was treated to her first boating excursion at age 4 months. Josh is also an auto enthusiast or “tinkerer of anything with motor”, as he expresses it. Josh is continually working a solution to a problem.