

DERRICK D. DEMAY

*Contact and biography:*

**Contact**

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**Experience**

Kaizen Wealth Management 2004 -  
Founding Member and Principal  
Charleston, SC

Merrill Lynch, 2000 - 2004  
Vice President, Senior Financial Advisor  
New York, NY and Charleston, SC

Morgan Stanley, 1997 – 2000  
Vice President, Financial Advisor  
Retirement Planning Specialist  
National Sales Director Award Recipient  
New York, NY

Gruntal & Co., Inc., 1995 - 1997  
Investment Advisor  
New York, NY

**Education**

Pace University - Lubin School of Business  
The Financial Planning Program, CFP Certificate Program, 2001  
New York, NY

University of South Carolina - The Moore School of Business  
Finance, 1994; Risk Management and Economic Security, 1994  
Columbia, SC

**Related Activities/Memberships**

Camp Happy Days – Kids Kickin’ Cancer, 2009 –  
Chairman of the Board, Finance Committee and Development Committee Member  
Charleston, SC

The Preservation Society of Charleston, 2004 - 2006  
Treasurer, Executive Committee Member, and Board Member  
Charleston, SC

Financial Planning Association Member      South Carolina Notary Public

*Gold clingeth to the protection of the cautious owner who invests it under the advice of men wise in its handling.  
- George S. Clason’s “The Richest Man in Babylon”*