

DERRICK D. DEMAY

*Contact and biography:*

**Contact**

Kaizen Wealth Management LLC 91 Broad Street, suite 300 Charleston, SC 29401  
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**Experience**

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| Kaizen Wealth Management 2004 -<br>Founding Member and Principal<br>Charleston, SC | Merrill Lynch, 2000 - 2004<br>Vice President, Senior Financial Advisor<br>New York, NY and Charleston, SC |
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| Morgan Stanley, 1997 – 2000<br>Vice President, Financial Advisor<br>Retirement Planning Specialist<br>National Sales Director Award Recipient<br>New York, NY | Gruntal & Co., Inc., 1995 - 1997<br>Investment Advisor<br>New York, NY |
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**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”*