

Greg Davis

Team Leader, Institutional Custody Product Management
Fidelity Investments

Greg Davis is a Vice President and Team Leader for the Insurance & Institutional Custody Solutions team for Fidelity Institutional Wealth Management Services (IWMS), which offers wealth management professionals and firms access to the investment, technology, and platform solutions they need to serve their investor clients and grow their businesses.

IWMS is part of Fidelity Institutional® (FI), a division of Fidelity Investments that offers investment insights, strategies, and solutions, as well as trading and prime brokerage services, to a wide range of wealth management firms, asset managers, and institutional investors. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals.

In this role, Mr. Davis is responsible for a team of product managers that support our institutional custody, retirement, HSA, annuity, and personal trust lines of business, as well as all vendor relations tied to these offerings.

Prior to assuming his current position, Mr. Davis supported FI in several other roles. As a product manager, he led the effort to bring the FI HSA offering to market and prior to that, he supported the retirement and institutional custody segments. Additionally, he was a client service manager within Client Experience, supporting the independent recordkeeping and bank/trust clients and the FIS vendor relationship.

He has been in the financial industry since 1998 and previously spent time at Putnam Investments within its transfer agent supporting its retirement and educational planning products.

Mr. Davis earned his bachelor of arts degree in political science from the University of Rhode Island. He holds the Financial Industry Regulatory Authority (FINRA) Series 6, 7, 24, and 63 licenses.

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