






# MIKE ROSS


Portfolio Manager &  
Public Speaker

## CONTACT

 415-890-2336

 mike.ross@justbuildwealth.co

 Mikerossspeaks.com

 84 W. Santa Clara St. Suite 734  
San Jose, CA 95113

## SPEAKING TOPICS

- **The False Hope of Global Diversification: Why Investing Internationally IS NOT In Your Client's Best Interests**
- **Keeping Clients Invested In Bear Markets: Tips From Almost 40 years In The Trenches**
- **Familiarity Bias Is Your Friend**
- **Fighting Fee Minimization Pressures Using The Tax Code**

## OUTCOMES

- **Confident Client Conversations**
- **Crisis-Proof Talking Points**
- **Retention Through Familiarity**
- **Powerful Fee Justifications**
- **Simplified Client Processes**

## **BIO –**

Michael Ross is a force in the financial industry – a veteran portfolio strategist, outspoken educator, and trusted advisor to financial professionals across the country.

With over four decades of hands-on experience managing stock and bond portfolios, he has helped clients weather market storms, avoid costly behavioral traps, and build wealth with discipline rather than guesswork.

As co-founder of the Academy of Certified Portfolio Managers, Michael has spent years training advisors to think differently about risk, diversification, and client psychology. His keynotes cut through the noise of traditional financial wisdom, delivering real-world insights that immediately elevate advisor performance.

Whether he's unpacking familiarity bias, tackling fee-pressure dynamics, or explaining why global diversification often disappoints, Michael equips audiences with actionable strategies they can use the moment they return to the office.