






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**

WHY MIKE ROSS?

1. He Defies Conventional Wisdom

Mike challenges the "growth at all costs" mentality with proven, risk-first strategies that thrive in real-world markets, not just textbooks.

2. Almost 40 Years in the Trenches

With decades of firsthand market experience, Mike brings unmatched credibility and perspective to every stage and audience.

3. Battle-Tested Through Six Bear Markets

His insights aren't theoretical - they're forged in volatility. Audiences walk away knowing how to stay steady when markets aren't.

4. Academy of Certified Portfolio Managers Co-Founder

A recognized leader in advisor education, he's helped shape the standards of modern portfolio management nationwide.

5. Unshakable Client Loyalty Through Personalization

Michael's personalized, principle-driven approach has built decades-long client relationships—proof that trust and performance can go hand in hand.

6. Engaging, Insightful, and Real

Michael's presentations combine sharp financial insight with storytelling and humor, leaving audiences informed, inspired, and ready to act.

THE BUZZ

"At the ACPM Conference, Mike both entertained the audience and challenged them to rethink some assumptions they made."

- **Pat McFarland**, Financial Advisor, Philadelphia

"I've heard Mike speak many times. He always shows up well prepared to discuss things important to the specific audience he's talking to."

- **Tim Lynch**, Financial Advisor, Pacific Northwest