

# Benjamin Schwantes, Ph.D., CFP®

Managing Editor | Content Strategy Leader | Investment Writer

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+1 (703) 302-0282

## PROFESSIONAL SUMMARY

- Award-winning editorial and content-strategy leader in financial services; engaging with senior stakeholders to shape omnichannel campaigns and product narratives that align to brand voice and business goals.
- Subject-matter expertise across Model Portfolios and Vanguard Personalized Indexing, with a track record mentoring writers and elevating creative and product acumen.
- 5+ years managing cross-functional teams (writers, editors, designers) and collaborating with marketing, product, and design to deliver compliant, accessible content at scale.
- Certified Financial Planner™ with deep background in business, economic, and historical subject matter.

## KEY ACHIEVEMENTS

- 3× APEX Award winner (2023–2025) for publication excellence on Vanguard advice campaigns.
- Recognized with the JANNAF Technical Executive Committee Special Service Award for managerial excellence.
- Published author with Johns Hopkins University Press; additional pieces in leading academic and industry outlets.

## AREAS OF EXPERTISE

Editorial Leadership • Content Strategy • Investment Writing • UX/Marketing Copywriting • Product Messaging • Compliance & Accessibility • Cross-Functional Collaboration • Stakeholder Management • Campaign Development • Mentorship & Coaching • AEM • Figma • JIRA • Adobe CC • Microsoft 365

## PROFESSIONAL EXPERIENCE

### Vanguard Group—Investment Writer/Content Strategist

2025–Present

- Serve as SME and lead investment writer/strategist for Model Portfolios, partnering with marketing strategists, business stakeholders, and design to produce digital and print content that reinforces brand voice and value propositions.
- Provide strategic guidance on messaging architecture and campaign alignment; coordinate with PMs and creative leadership to ensure appropriate scoping and resourcing across initiatives.
- Mentor junior writers and share product-specific acumen to improve consistency, speed, and quality across deliverables.

### Vanguard Group—Senior CX Writer

2021–2025

- Planned and developed advice marketing and educational content for the Participant Adoption & Engagement Personalization pod, ensuring accessibility and testability across channels and client design systems.
- Supported WebOps teams with investment/marketing microcopy, social copy, and cross-channel messaging; collaborated with clients and stakeholders and provided timely leadership updates.

### Johns Hopkins University, Energetics Research Group—Managing Editor

2016–2021

- Led daily production of the [JANNAF Journal of Propulsion and Energetics](#) and semiannual *JANNAF News*; coordinated peer review, supervised editorial/design staff, and managed communications and marketing strategy.
- Represented the journal at senior stakeholder meetings, conferences, and professional events.

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## German Historical Institute Washington—Research Associate

2011–2015

- Coordinated production of two volumes for the [Immigrant Entrepreneurship Project](#)
- Recruited authors, edited for historical accuracy and clarity, managed rights, and coordinated with external stakeholders.

## Saylor Academy—Strategic Consultant in History

2010–2013

- Developed History major requirements and co-developed STS curriculum for the [online course platform](#).
- Produced self-directed survey courses.

## Widener University—Lecturer

2006–2023

- Designed and taught introductory and intermediate-level online history courses.
- Created syllabi and multimedia instructional content aligned to educational standards.

## EDUCATION

- McKinsey Hispanic & Latino Management Accelerator (2024)
- Executive Certificates (Management Development—2020; Human-Centered Design—2019; Business Communication—2018), Johns Hopkins Carey Business School
- Ph.D. & M.A., History — University of Delaware
- B.Ph. & B.A., University of Pittsburgh

## CERTIFICATIONS

- Certified Financial Planner™. CFP® Board, 2024. Certification # 477978

## PUBLICATIONS & PUBLIC WORK

- *The Train and the Telegraph: A Revisionist History*, Johns Hopkins University Press (2019). Check out my book interview [here](#).
- Financial advice web content: How Risk Shapes Your Investment Mix; Go Beyond Tax Season with a Financial Plan; Digital Advisor Personalization site; DA Investor Profile video

## LEADERSHIP

- Leadership Team Member, Vanguard Creative Collective (2024-Present)
- Lead, PACE UX Content Editorial Council (2024-2025)

## LANGUAGES

- German (Intermediate reading, basic speaking); Spanish and French (Basic)

## OTHER

- *Secret-level* security clearance from U.S. Federal Government