

**THE WAY**  
*of the*  
**WALL STREET**  
**WARRIOR**



**CONQUER THE CORPORATE GAME  
USING TIPS, TRICKS, AND SMARTCUTS**

**DAVE LIU**

WITH ADAM SNYDER

**WILEY**

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## **Praise for *The Way of the Wall Street Warrior***

“As someone who has worked on Wall Street my entire career, I can definitively say that *The Way of the Wall Street Warrior* has some of the best tips for getting ahead. The humor and stories make for a fantastic read and I strongly encourage anyone at the start or mid-career to read this book and refer to it frequently as they try to climb the corporate ladder. You won't regret it!”

**Tina Longfield, Managing Director, Truist Securities,  
formerly SunTrust Robinson Humphrey**

“One of the funniest insider books I've read about Wall Street since *Liar's Poker*! Dave's brilliant and transparent guide to survive and thrive is a must-read for anyone trying to break into finance or any high-powered industry.”

**Chris McGowan, Former Managing Director at  
Madison Dearborn, former banker at Morgan Stanley,  
and now Adjunct Professor at the University of  
Chicago's Booth School of Business**

“Dave's book is a great read for anyone looking to get a leg up on their career. He gives practical advice you can only learn from the school of hard knocks in a funny, anecdotal way. Whether you're starting your career or rising up the ladder, Dave will give you invaluable pointers that I'm sure will put you over the top.”

**Joanne Chen, General Partner of Foundation Capital  
and former Jefferies banker**

“*The Way of the Wall Street Warrior* proves to be essential, not just for those seeking to conquer Corporate America—

but for anyone who's ever dared to believe in themselves and their dreams. Invaluable and inspiring.”

**Vivek J. Tiwary, #1 *New York Times* bestselling author of *The Fifth Beatle: The Brian Epstein Story***

“Few leaders blend deft business acumen, cultural savvy, inclusion, and heart as Dave Liu does. It's why he's uniquely positioned to pen *The Way of the Wall Street Warrior*, a rare multi-hyphenate guide to advancing one's career in both established and novel environments. Dave gives you direct, practical advice to achieve your goals with levity—particularly if you're a traditionally mis- or underrepresented leader.”

**Bing Chen, President and Co-Founder of Gold House**

“Do you want to know how to succeed on Wall Street (or Main Street) and pee your pants from laughter? Then *The Way of the Wall Street Warrior* is a MUST read. It's loaded with practical tips, strategies, philosophies, insider secrets, and plenty of off-color humor to entertain you. Dave Liu is the classic Malcolm Gladwell “Outlier”—the true David who beat Goliath. He shares critical lessons to help you win on Wall Street (or any cutthroat profession) when the deck is stacked against you and then prepares you for living the good life.”

**Brian Flynn, Co-Founder of FounderPartners and former Morgan Stanley banker turned serial tech entrepreneur and investor**

“I've had the pleasure of knowing Dave from when he started his career in investment banking as a young, superstar first-year analyst. His book is a terrific read, full of smart insights, and practical, actionable advice. Delivered in Dave's inimitable style, *The Way of the Wall Street Warrior* is witty, entertaining, and rich with content and good ideas.”

**Michael Henkin, Former Senior Managing Director of  
Guggenheim Securities**

“Dave provides an entertaining take on a serious topic, what really happens when you finally ‘make it’ and get that first job on Wall Street. He opens your eyes to the way the finance world actually works, with a funny but realistic portrayal, not what you get in Hollywood movies or even in the fanciful presentations on college campuses. For all of you whose family didn't come to America on the Mayflower, you owe it to yourself to read this book.”

**Juan Alva, Managing Director of Pelham S2K and  
former Goldman Sachs banker**

“If you want to skip ahead and condense 10 years of figuring out how to succeed in Corporate America into one year, read this book. Adopt the wisdom and insider secrets in this book and you'll blow past your peers. Don't play the same game as everyone else. Learn from those who have succeeded and you'll become your own unicorn.”

**Edward Fu, President of Happy Masks and former  
Jefferies banker**

“It took me ten years working for Dave to extract a fraction of the knowledge so artfully (and humorously) condensed in *The Way of the Wall Street Warrior*. I wish I'd had this long prior to ever signing up for Finance 101, but lucky, astute readers can glean decades of insight within. Far from an edgier, funnier Super Saturday prep read, *The Way of the Wall Street Warrior* should be read, re-read, and frequently consulted as a living career bible—whether you're 19 or 49—for anyone interested in making it big in any career.”

**Paul Clausung, Managing Director at Fluential  
Partners and former Jefferies banker**

“Dave and I go way back. Think high school in Taipei at an American school. Both culturally and socioeconomically,

Dave's background provides a unique and compelling narrative. His personality and humor help take a complex subject and turn it into an entertaining read! Dave is an Asian American who spent time in both Hong Kong and Houston. So think Asian with a British accent and southern twang!”

**Spencer Wang, Former Chief Investment Officer of Seasons Capital and former Credit Suisse and Salomon Brothers banker**

“This book's irreverent humor will keep you laughing throughout, but the lessons inside should be taken very seriously. I've spent half my career in finance, the other half in tech, and Dave's practical, no-BS advice on what it actually takes to succeed and rise through the ranks is broadly applicable to any high-powered, competitive industry.”

**Eric Hu, Director of Corporate Development at Twilio and former Jefferies banker**

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*This book is dedicated to my mother, Vicki Liu, who showed me through hard work and determination that anything is possible. She also taught me not to take crap from anyone —from jerk customers at Safeway to narcissistic CEOs.*

*Thanks, Mom!*

## Acknowledgments

This book would not have happened if it were not for the heroic efforts of me, myself, and I. So first, I'd like to thank myself for a job well done and pat myself on the back. I honestly thought I wouldn't be able to write enough to fill a postcard, but it looks like I have plenty to say!

I'd like to thank those people who allowed me to waste an hour or more of their precious Netflix time by sharing their stories. Extra kudos for letting me use their real identities. That includes Juan Alva, Frank Baxter, Herald Chen, Joanne Chen, Paul Clausing, Edward Fu, Eric Heglie, Michael Henkin, Gina King, Chris McGowan, Harry Nelis, Bret Pearlman, Sreene Ranganathan, Jon Seiffer, Spencer Wang, Dave Wargo, and Lauren Wu.

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I'd like to give a big high-five to my co-writing partner, Adam Snyder. Thanks for keeping me on track, fixing all the mistakes, and making this book readable. Without your help, my Mom would've been the only one to read it.

Last, but certainly not least, I'd like to thank my family. To my wife, Lauren Wu, for encouraging me to write a book to share my love of storytelling. To my older son, Logan, who convinced me that it was time to press the eject button out of the Wall Street rat race and devote my life to being a great dad. And finally to my younger son, Lucian, who's convinced I'm writing a book about working at Wal-Mart and managing my way out of paper bags. Thanks to all of you for constantly reminding me that there's much more to life than making a ton of money!

*Dave Liu*

## About the Author

Dave Liu is a seasoned veteran of Wall Street where he worked for almost 25 years. He started his investment banking career working for Goldman Sachs and then joined the fledgling investment bank Jefferies when it had less than 200 employees. Today, Jefferies is a multi-billion-dollar public company and one of the world's leading investment banks. During his 25-year career at Jefferies, Dave progressed from the proverbial janitor level of analyst to managing director, co-running all digital media and Internet investment banking activities.

As one of the firm's only managing directors of color, and among its youngest, Dave successfully rose the ranks by not only working his ass off, but also playing the corporate game. He has managed, mentored, and trained hundreds of bankers, many of whom have gone on to some of the best business schools in the world or achieved great career success on Main Street and Wall Street. He has completed over \$15 billion of transactions for hundreds of companies, including IBM, Google, Microsoft, Sony, Yahoo!, and Yelp.

After retiring from Wall Street in his early 40s, Dave became an entrepreneur, starting four companies, and an active investor. He has helped many multi-billion-dollar companies, including Internet Brands/WebMD, a technology company; Vobile, a video software company; and MobilityWare, one of the world's largest mobile gaming companies. He is involved with Capacity, an artificial intelligence platform; Stampede, a film production company; TEG Live, a Grammy Award-winning and Tony Award-winning live production company; and Philz Coffee, an iconic coffee retailer. He was also CEO advisor to

ProSiebenSat.1 Media, one of the largest media companies in Europe.

Dave is also a perspiring artist and writer who is learning how to draw and write “funny.” He studied creative writing at the University of Pennsylvania, Sundance Institute, and The Second City. He publishes a career advice column called *Breaking Bamboo* and a cartoon series called *The ABC Life*.

Dave completed the Management & Technology Program at the University of Pennsylvania where he received a bachelor of science in systems science and engineering (with concentrations in manufacturing and robotics) and a bachelor of science in economics (with a concentration in finance) from the Wharton School. He graduated with great honors and was inducted into the national engineering honor society, Tau Beta Pi. Dave also attended Harvard Business School where he received his master's degree in business administration.

Dave is active in philanthropy and nonprofit organizations. He currently serves on the Executive Board of the Management & Technology Program at the University of Pennsylvania and on the Trust Advisory Committee of Tau Beta Pi. His family supports many charitable initiatives helping women of color, children with disabilities, and other disadvantaged communities. Net proceeds from this book will go toward charities helping children born with clefts, Asian Americans, and other disadvantaged groups.

Follow Dave on his website, [www.liucrative.com](http://www.liucrative.com).

Adam Snyder, since working as a congressional press secretary, has been a freelance writer for decades, authoring or co-authoring more than a dozen nonfiction books focusing on such diverse topics as real estate, business leadership, and Buddhism. He is currently

working on a novel revolving around the descendants of H. G. Wells. Adam is also the president of the Oscar-winning animation company Rembrandt Films and lives everywhere with his filmmaker wife, Pat. They have two children, a son-in-law, and a granddaughter.





THE WAY OF THE WALL STREET WARRIOR

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COGNITIVE BIAS



# Introduction

## Game On

Congratulations! Whether you're just getting started in your nonexistent career or contemplating a switch from your current job, the smartest thing you've done to date is to buy this book. If you bummed it off your buddy, then kudos to you! You've already taken one small step toward proving you have the right mettle for earning a high salary in this dog-eat-dog world. The pearls included in these pages may not be the first career advice you've ever received, but I guarantee these tricks of the trade will be the most valuable.

As the title suggests, *The Way of the Wall Street Warrior* will show you how to use tips, tricks, and shortcuts to get hired, get ahead, survive, and excel on Wall Street, Main Street, or any other street where you're mining for gold. It comes from my experience as a 25-year investment banking veteran who did the unthinkable. I, an Asian American with a cleft lip and palate, rose up in the white, male-dominated world of high finance, becoming a managing director before the age of 33. I then left my high-profile job in my early 40s, on my own terms, while on top.

While my lessons were learned on Wall Street, they're applicable to *anyone, anywhere* working in *any* competitive corporate environment. If you can make it in the Machiavellian world of banking, you can make it anywhere. Wall Street is a jungle, the toughest jungle there is. I had a highly successful career because I learned how to game the system, and now I'm writing this book so you'll learn my tricks and avoid making the same mistakes as your peers.

# Unrig Your Mind

If you care about money, this book is for you. If you want practical advice without the BS but don't mind some acerbic humor that goes along with it, you're in luck. If the do-nothing in the cubicle next to you is earning more than you, or you can no longer stomach hearing your mother's sighs and your father's *tsk-tsks*, or you need a kick in the pants—read this book!

Here's what you'll gain: You'll learn how to survive and thrive by *not* relying on the skills you mastered in the warm confines of the classroom. Instead, you'll learn from me what it actually takes to get ahead.

Another reason to read this book is if you're stuck in a dead-end job. You might be severely disillusioned and filled with self-doubt. Perhaps you've been wondering if there is a secret handshake that will gain you entrance into the inner circle or a magic carpet that will carry you up to the executive suite. Maybe you're the person who buys every how-to book you can get your hands on, hoping one might unlock the secrets for getting that coveted raise or promotion. Even if you have yet to reach this level of angsty ambition, I can guarantee you've seen dropouts become billionaires or buffoons become your bosses and asked yourself, "Why not me?" What's the answer? You already know because you feel it in your bones: THE SYSTEM IS RIGGED!

*The Way of the Wall Street Warrior* is going to *unrig* it for you. From a young age, we're pounded with the idea of meritocracy—that we're rewarded based on our talents. If we just study hard, keep our nose to the grindstone and follow the straight and narrow, we can achieve greatness. These rules of engagement were pounded into my brain during my Asian American upbringing. The tenets of

respect, honor, and obedience are an integral part of our culture. We're taught that if we work hard and obey the rules, life will take care of itself, and that in business you'll get promoted and do great.

Horse manure!

I got ahead by ignoring these rules. Most of what we're taught in school and by our elders are just guardrails put there to keep us in check. We know that getting the right opportunity is less about *what* you know and more about *who* you know and that the easiest way to get filthy rich is to *start* rich. Of course that doesn't work for most of us, so if you, too, feel fooled, it's time to come up with a new mindset and a new game plan. If you take this book seriously (but not too seriously), the tricks and tactics revealed in the following pages will drop like dollars from heaven.

## **Built with Sweat, Backed by Science**

I have more good news. The tactics in this book are not just something I made up out of thin air. In fact, they're based on scientific research in the fields of **cognitive bias** and **behavioral economics**. In get-rich-for-dummies terms, these disciplines use an understanding of human psychology to account for why people often don't act rationally, particularly in economic decision-making. Smarter people than I have won Nobel Prizes for their work in this field, and I'm here to summarize their most salient takeaways—to help you get that big promotion and salary you've always wanted. I got hooked on the field more than 20 years ago, read every book I could get my grubby hands on, and actually applied what I found to advance my career. So what are their conclusions? That human beings are imperfect and fundamentally irrational when making decisions. In my words, people can be *stupid*.

The interesting point here is that there are creative ways (that have scientific backing) for you to maneuver events and attitudes toward your advantage. But don't worry, there won't be any pedantic lessons, Excel spreadsheets, PowerPoint gibberish, or 15-letter acronyms in my explanations. You've had a lifetime of that already. Instead, *The Way of the Wall Street Warrior* will put in plain English the scientific basis behind my practical advice. Terms like **affinity bias**, **signal-to-noise ratio**, **asymmetry of information**, **social proof**, and **Dunbar's Number** might seem like scientific gobbledygook, but a shorthand knowledge of each of them can give you the upper hand in any cutthroat business environment. And for those wanting a cheat sheet of the tips, tricks, and science covered in this book, you can sign up on my website<sup>1</sup> to get a copy of my Career Codex.

## Lessons from the Elephant Boy

The first part of *The Way of the Wall Street Warrior* is where you'll learn how to edge your foot into the door and then how to dance the dance when you get there. It provides titillating tips about landing an interview (including scrubbing your social media accounts like leprotic calluses on gangrenous feet). This set of chapters will show you how to knock their socks off when you do get that one-on-one interview.

From there, we'll learn how to play well with others (suck up) and how to have the adaptability of a cockroach (always show how and why you belong). Then again, if you haven't made it past square one, I'll have some gems about using failure as fertilizer, hosting short self-pity parties, and then going out and crushing it.

The middle chapters of *The Way of the Wall Street Warrior* will focus on making your way up the **corporate ladder**. If you want to be showered with financial rewards and prestige, the name of the game is longevity, and that means making the best possible decisions to ensure your rise. Climbing the rungs motivates us because it promises more of everything—more compensation, more respect, more power.

This middle part is all about how to lead the pack, like choosing an office consigliere who will point out for you the potholes and political landmines. Remember, with each promotion, the higher you climb, the narrower the room, so ally yourself with the senior person who makes the most money and carries the most sway. Soon only one ass can sit on each rung. Make it yours!

The final chapters are where we discuss the “less critical” aspects of your life, like your health and well-being, significant other, and progeny. I'm being facetious, of course, but sometimes when you're simmering in the pressure cooker, what *should* be most important takes a back seat to what you *think* is important. I'll also share some insights on wealth creation and the afterlife (aka life after making piles of dough). This section will stress the importance of developing a personal brand—not the one on your LinkedIn profile, but the description given when someone asks about you when you're not in the room. You always want to manage the answer to the question, “What do you think of Dave Liu?”

One particular chapter close to my heart (yes, I have a heart) is [Chapter 15](#), “Turn Liabilities into Assets.” I haven't always been the cocky guy who comes across in this Introduction. In fact, at my ex-employer, Jefferies, I actually earned a reputation for having empathy for those who weren't making the grade or who were struggling to