**Sean H. Moore**

Duluth, GA 30096 - 251-802-6519 - [Seanmoore507@gmail.com](mailto:Seanmoore507@gmail.com)

**PROFESSIONAL EXPERIENCE**

TGS Financial Advisors, Philadelphia, PA (remote) – **Multiple Roles**

**Portfolio Analyst**

*May 2019 - Present*

-Oversee and maintain data connections between client accounts, portfolio system, and planning software

-Manage and update firm investment models

-Audit, clean data in portfolio system for correct performance and transaction data; correct data where needed

-Identify, coordinate, and fix issues with portfolio system software developers

-Extract and present portfolio data using Microsoft Excel/Google Sheets for insights into client and firm investment opportunities

-Design and implement dashboards in Microsoft Excel/Google Sheets to enable firm users to visualize and interact with data for key performance indicators

-Document processes for maintaining various firm databases

-Research potentials stocks, mutual funds, and exchange-traded funds for possible goodness of fit for client portfolio

**Financial Planner**

*March 2014 - Present*

-Establish financial goals with clients and financial advisors

-Perform Monte Carlo analyses in financial planning software to determine suitability of client retirement goals

-Prepare financial planning and investment reports for client presentation

-Extract data from financial planning software and use Microsoft Excel to model and present client data in an understandable manner to both clients and advisors.

-Design, implement and manage dashboard in Microsoft Excel/Google Sheets for financial planning workflow and client deliverables processes

-Maintain multiple, tight deadlines delivering reports to both clients and advisors

-Document and update processes for conducting various firm planning workflows

-Create a data-driven process to track planning department’s growth, efficiency, and success

-Lead weekly meetings to discuss current goals and objectives for planning department

-Place securities trades

**RELEVANT COURSEWORK**

Volunteer Program Assessment (VPA), Atlanta, GA – **Volunteer Consultant**

*Oct 2021 – Present*

-Partners with clients to administer and analyze Qualtrics-constructed online engagement survey, the Volunteer Program Assessment, for volunteers to increase future effectiveness.

-Produces customized reports and evidence-based recommendations for improving organizational effectiveness and retention and implemented findings.

University of Georgia, Athens, GA – **Advanced Analytics**

*Summer 2021*

-Analyzed, cleaned, and created comprehensive visualizations for large datasets in R

-Developed multiple predictive models (Support Vector Machine, Ridge, Lasso, and Logistic regression, KNN, Decision trees) in R

Mercedes-Benz, Atlanta, GA - **Job Analysis**

*Aug 2020 – May 2021*

-Conducted a job analysis for Mercedes-Benz on new Mobile Service Technician role.

-Conducted research into the existing mobile service technician space to understand the role as it currently exists

-Interviewed subject matter experts and performed job observations to create a survey to identify critical tasks and knowledge, skills, opportunities, and other characteristics for success in the Mobile Service Technician role

**-**Analyzed survey data in Excel

**-**Coauthored job analysis report and presented survey data findings to Mercedes-Benz key stakeholders

**LICENSES AND CERTIFICATIONS**

**Series 65** (#6328108)*,* Uniform Investment Adviser Law Examination

**SKILLS**

Microsoft Excel – R – Time Management (Remote since August 2016) – Public Speaking – Team Facilitation – Communication – Research – Process Improvement – Project Management – Google Sheets

**EDUCATION**

May 2013 **Bachelor of Science,** Political Science

University of South Alabama, Mobile, AL

Minor: Economics

Aug 2020- **Master’s Degree** in Industrial and Organizational Psychology

Aug 2022 University of Georgia, Athens, GA

GPA: 3.95

Sept. 2022- **Master of** **Business Administration**

Sept. 2024 University of Georgia, Athens, GA