**Sean H. Moore**

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**PROFESSIONAL EXPERIENCE**

TGS Financial Advisors *2014 - current*

**Portfolio Systems Manager *2022 – Current***

* Manage firmwide portfolio projects from inception to completion
* Automated numerous aspects of workflows (e.g., billing, data extraction, investment research) using various tools such as Excel, Power Query, R, Power Automate, and ChatGPT
* Conduct and manage quarterly and annual audits of portfolio system data with internal and external teams
* Identify, coordinate, and fix issues with portfolio system software developers
* Give presentations on portfolio data using Power Point/Microsoft Excel/Google Sheets for insights into client and firm investment opportunities and objectives
* Design and implement analytic 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, bonds, mutual funds, and exchange-traded funds for possible goodness of fit for client portfolios
* Oversee billing of $320M+ assets; conducted audit of former billing process and discovered $30K in missed one-time billing and $12M+ in unbilled assets (~$90-100k in annual revenue)
* Place securities trades
* Develop robust controls and processes to systematize portfolio data, workflows across firm, and minimize errors
* Build financial models in Excel to forecast potential portfolio changes or market scenarios

**Financial Planner *2014 – 2022***

* Lead data-gathering discussions with clients to understand their current financial situation and future financial goals
* Performed Monte Carlo analyses and financial forecasting to determine suitability of client lifetime wealth goals
* Prepared financial planning and investment reports for 100+ clients on annual basis
* Extracted data from financial planning software and use Microsoft Excel to model, present, and tell a comprehensive story of a client’s financial lifetime to both clients and advisors
* Designed, implemented and managed dashboards in Microsoft Excel/Google Sheets for financial planning workflow and client deliverables processes
* Maintained multiple, tight deadlines delivering reports to both clients and advisors
* Documented and updated processes for conducting various firm planning workflows
* Created a data-driven process to track planning department’s growth, efficiency, bottlenecks, and success; strategize, test, and implement process improvements for bottlenecks
* Lead weekly meetings to discuss current goals and objectives for planning department

**LICENSES, CERTIFICATIONS, AND SKILLS**

**License**

Series 65(#6328108)Uniform Investment Adviser Law Examination

**Certification**

ChatGPT Prompt Engineering (https://coursera.org/share/45cc4654707e07c751ad6a4c97e8aba6)

**Skills**

Advanced Microsoft Excel – Power Query – R – SPSS – Statistics – Public Speaking – Research (quantitative & qualitative) – Process Improvement – Project Management – Google Sheets – Storytelling with Data – ChatGPT – Currently learning Python

**EDUCATION**

University of Georgia, Atlanta, GA campus

**MA, Business Administration (Professional Program) *9/2022 – 9/2024***

*Currently enrolled*

**MA, Industrial and Organizational Psychology *8/2020 – 8/2022***

GPA: 3.95

University of South Alabama, Mobile, AL

**BS, Political Science *8/2009 – 5/2013***

Minor: Economics