

JEFF MOORE, CLPF

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Jeff Moore CLPF, has over 30 years of business experience as a commercial banker. He has experienced in working with small and middle market businesses owners and individuals in meeting their financial goals. Jeff has extensive knowledge of banking deposit options and products, personal, business and real estate loan products and credit structuring. As a “general” business banker, serving a multitude of personalities, Jeff is skilled at personal and professional communication and negotiation. His banking background includes financial risk analysis and underwriting of business working capital loans, equipment loans, leverage buy out loans, personal real estate loans and income property real estate loans. Jeff holds a Bachelor of Science degree from Indiana University, Kelley School of Business. He is a past board member of Habitat for Humanity. Greater Los Angeles.

Jeff served as a family fiduciary for 17 years prior to becoming a California Licensed Professional Fiduciary. He is a Certified National Guardian and is a member of the Professional Fiduciary Association of California and the National Guardianship Association.

EXPERIENCE

Family Fiduciary (conservator, trustee, and executor) for over 17 years of stroke victim requiring implementation of all aspects fiduciary management; residence care, assisted living care, health care, bill paying, investment management, real estate management, end of life care health care, family communication, legal issue management, court accounting and appearances, etc., etc.

Entrepreneurial small business finance manager and consultant performing, responsible for, and supervising all aspects of finance and human resources.

Commercial banking professional with extensive and diverse background in credit underwriting, portfolio management and business development. Managed a \$65 million portfolio comprised of client relationships in multiple markets, industries including service professionals and high net worth individuals. Responsibilities included sales origination, underwriting of complex credit facilities and delivery / relationship management.

FINANCIAL MANAGER / CONSULTANT

Financial Manager / Controller for entrepreneurial businesses providing full charge financial / accounting management and human resources. Beyond a bookkeeper for entrepreneurial business.

ENGAGEMENTS:

2013 –present

- **LAW OFFICE OF DAVID A. SOLITATARE** (current)
- **KIRK O' the VALLEY CHURCH/ KIRK O' the VALLEY SCHOOL**
- **VIDEO SYMPHONY, Inc.** (Trade School)
- **TECHNIFEX, Inc.** (Manufacturer physical animated props & architectural features)

Law Office of David A. Solitare

Bookkeeping, billing, accounts receivable and accounts payable. Management and use of Quick Books and Time Slips financial management software programs.

Kirk O' the Valley - church and school (preschool through grade 5)
(Consultant / Short term employee)

Financial Manager / Controller / Human Resources Manager of church and school annual budget \$1.8 million. 45 employees. Student enrollment 185. Responsibilities include creating annual budget and managing adherence, managing all aspects of payroll, accounts receivable, accounts payable.

Communicate to employees benefit package and communicating to benefit provider for adherence to policy, procedure of eligibility of enrollment. Formulate and direct payroll procedures & policy. Major role creating collaborative working environment.

As financial / human resources manager mindful of serving constituency of children, parents and teachers.

Video Symphony, Inc. (Trade College training in film editing / animation)

Financial Manager focusing on billing and collections. Contact current & former students for tuition & loan payments. Interface with controller & financial aid officer to insure accuracy of billing & recordation of revenue.

Technifex, Inc. (Manufacturer physical animated props for theme park industry, Special effects (water, lighting, atmospheric, etc.) features at entertainment complexes (theaters, museums, casinos)

Finance Manager focusing upon on accounts receivable, accounts payable and project cost accounting of specialty manufacturing firm utilizing Microsoft Dynamics accounting software.

Responsibilities:

Input of project est. revenue and cost.

Generation of reports insuring adherence to budget.

Input & tracking of AR.

Input of high volume of po's according to terms.

Annual filing to government and corporate customers to maintain eligibility to bid contracts.

COMMERCIAL BANKING

- **VICE PRESIDENT Senior Relationship Manager Commercial Loans**

Community Bank, Burbank, CA

2012 to 2013

Pacific Western Bank, Beverly Hills / Woodland Hills, CA

2002 to 2012

Relationship Manager / Commercial Loan Officer: Managed totality of business and personal banking client relationships (deposits, personal, business and real estate loans) and related banking services such as cash management, trade finance and merchant card, remote deposit. Internet banking, etc. and developed new business relationships. Performed financial analysis and credit underwriting. Structured transactions in obtaining credit approval and managed portfolio of complex credits. Worked with clients to present solutions to short and long term strategic objectives. As team leader coordinated specialized product team members to deliver full service banking (credit, deposit, internet banking, etc.)