QUARTZ FINANCIAL

Shane Moore

Shane Moore, co-author of Sudden Wealth… It Happens: The Stories of Seven Families and the Challenges They Face with Financial Windfalls, is a Managing Partner and Co-Founder of Quartz Financial, a comprehensive wealth management boutique specializing in the unique issues faced by sudden wealth recipients. Since 1994, Mr. Moore has provided financial planning and wealth management services to individuals and families facing a sudden wealth event as well as those with established wealth. Prior to co-founding Quartz Financial in 2007, Shane held senior advisory positions with major Wall Street investment firms and private banks.

As a client advisor with JPMorgan, Mr. Moore was responsible for providing strategic advice, team oversight and coordination for the firm's wealthy clientele. Other posts within JPMorgan included Capital Markets Advisor overseeing client assets in excess of $500 million and Regional Principal for the Austin, San Antonio, and El Paso private banking investment offices. While with Citigroup Smith Barney, he was a financial planning specialist and director for the Corporate Client Group. "There is absolutely no substitute for the technical and hands-on experience I have gained on the institutional side of the industry—I've been fortunate to work with some of the most successful families and business owners in the country," said Mr. Moore.

Shane received a Master of Science specializing in Finance from Texas Tech University and a Bachelor of Business Administration concentrating in Finance from Texas State University. "One of the mantras of business school is 'Maximize shareholder value.' Yet as I advanced my career at the large banks, the conflicts of interest within this statement became clear – the bank's goals are not always in sync with the client's goals." To address this conflict, Mr. Moore co-founded Quartz Financial in order to be accountable and responsible to his clients, not corporate sales managers.

Mr. Moore is a Certified Financial Planner™ practitioner and holds series 7, 24, 53, 63 and 66 securities registrations with LPL Financial and Group 1 Life and Variable Contract Insurance License. He has been featured in Texas Monthly Magazine as a Central Texas Five Star Wealth Manager for the past three years by Five Star Professional, a professional research firm.
He is active in his community as a member of the Financial Planning Association, the Financial Therapy Association, and St. Edwards University Gift Planning Advisory Council. During free time, Mr. Moore and his wife, Carol are very involved with the Eanes community and stay quite busy raising their twins, Renny and Quinlan.

**The 5 Star Wealth Manager is an award based on client satisfaction. Respondents evaluate criteria such as customer service, expertise, value for fee charged and overall satisfaction. The overall evaluation score is based on an average of all respondents and may not be representative of any one client's evaluation.*