Tyler M. Seymour

863-207-0142 | tmseymour2011@gmail.com

Professional Profile: Empowering clients with informed financial decisions

WORK EXPERIENCE

Financial Advisor **November 2024 - June 2025**
The Nalls Sherbakoff Group Knoxville, TN
- Financial Plan preparation & presentation to clients & prospects (MoneyGuidePro)
- Tax Planning Analysis for Roth Conversions (Holistiplan)
- Building portfolio models, trading, and rebalancing accounts through Charles Schwab
- Studying the latest in Behavioral Economics & Passive Management

Wealth Management Advisor / Portfolio Manager **2022 - 2024**
Ingram Financial Group Winter Haven, FL
- Financial Plan preparation & presentation to clients & prospects (E-Money)
- Portfolio Manager of $85M & 500 accounts, trading and rebalancing quarterly
- Discussing tax planning, estate planning, & risk management with clients & prospects
- Acquiring new clients by client referrals, marketing, & firm reputation
- Giving priority to higher net worth clientele

Client Associate **2019 - 2022**
Ingram Financial Group Winter Haven, FL
- Managed all aspects of client paperwork
- Assistant to Financial Advisors & Portfolio Manager, trading 401ks & Annuities
- Responsible for RIA advisory-fee billing & invoicing each quarter

Climbing Director **2018**
Boy Scouts of America Cora, Wyoming

Accounts Receivable Specialist **2017 – 2018**
Accountemps Boise, Idaho

Personal Banker **2017**
Keybank Caldwell, Idaho

Customer Service Representative **2014 - 2015**
Artco Printing Company Rexburg, Idaho

EDUCATION & CERTIFICATIONS

Master of Business Administration **2018**
Warner University Lake Wales, Florida

Studying for CFP Exam **Estimated 2026 completion**
Dalton Education

FINRA Licenses: Series 7, 63, 65 **Present**
FL 2-15 Life, Health, & Variable Annuity Insurance Licenses **Present**