

# San Francisco professionals

## Sterling Moore, CFS®

### Senior Vice President



Sterling Moore is a business development officer for CIBC Private Wealth in San Francisco, with over 25 years of financial industry experience. In this role, Sterling services high-net-worth clients, foundations, endowments and family office clients.

Prior to joining the firm, Sterling was a vice president and regional director with Orion and Brinker Capital Investments. In this role, he supported Financial Advisors and Clients throughout Northern California and the Pacific Northwest in building custom portfolios with efficient tax transitions and tailored investment strategies to efficiently transfer generational wealth that aligned with a client's personalized investment goals and unique financial plan.

Sterling started his career as a financial advisor, then became a financial planning consultant where he worked to create financial plans, estate plans and designed allocations before going to the wholesaling side of the financial services industry. Sterling has worked at firms such as Morgan Stanley, Invesco, Global Atlantic and MassMutual. At these firms, Sterling was responsible for educating financial advisors and clients on mutual funds, ETFs, insurance and individual stock portfolios and how to utilize them to achieve client goals.

Sterling received his Bachelor of Business Administration from Southern Methodist University, has his CFS Designation and has been a featured Keynote Speaker at multiple National Conferences around the country.

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