BRIAN G. TAYLOR, CFP®

Director of Engineering

Bachelor of Arts - Business Marketing, Ohio University, 2010

Executive Certificate in Financial Planning, Duquesne University, 2013

RESULTS DRIVEN - Software Engineer, experienced in building proprietary tools, assembling new data architechtures from scratch. Fundamental Cloud understanding – Data Movement, Data Storage, Data Analytics. Have successfully led the technical strategy, design, development and implementation of Enterprise Data Solutions.

CORE COMPETENCIES

- Python
- Web Frameworks: Django
- Django Rest Framework
- SQL (PostgreSQL, MySQL)
- NoSQL (DynamoDB)
- Data Engineering
- Amazon Web Services (AWS)
- Agile Development
- Version Control (Git)

SKILLS

- Strong application development experience (Django and Django Rest Framework)
- Hands-on experience with serverless Amazon Web Services (AWS) technologies.
- Data Engineering experience: ETL, ELT, setting up data pipelines.

EXPERIENCE

THE MATHER GROUP Chicago, IL

Director of Engineering Jan 2020 - Present

- Created data pipelines and data warehouses for business process improvement, BI dashboards, and reporting.
- Developed proprietary tools and systems that leverage data as a cometitive advantage.
- Established formal data practices, focusing on data governance, quality, and security.
- Created automation for the seamless introduction and usage of data from numerous 3rd party sources.
- Started greenfield projects, assembling new data architectures from scratch, utilizing best-of-breed tools.
- Successfully led the technical strategy, design, development and implementation of Enterprise Data Solutions.

THE MATHER GROUP Chicago, IL

Investment Advisor Oct 2017 - Dec 2019

- Provided clients with comprehensive guidance regarding investment, retirement, and financial planning needs.
- Developed financial plans for clients, allowing for clear vision of goals, objectives, and constraints.
- Managed client portfolios utilizing Stocks, ETFs, Mutual Funds, and other investment vehicles.

SHOREBRIDGE WEALTH MANAGEMENT Pittsburgh, PA

Investment Advisor March 2014 - Sept 2017

- Provided clients with comprehensive guidance regarding investment, retirement, and financial planning needs.
- Developed financial plans for clients, allowing for clear vision of goals, objectives, and constraints.
- Managed client portfolios utilizing Stocks, ETFs, Mutual Funds, and other investment vehicles.
- Created Investment Policy Statements, outlining client goals, and detailed strategies to meet these goals.
- Built and monitored quantitative stock ranking models for weekly firm research meetings.
- Developed and implemented propriotary internal reporting system utilizing Python Pandas.

LICENSES AND CERTIFICATIONS

- Certified Financial Planner™
- 2023 Level 3 CFA Candidate