

**Errold F Moody Jr**

**11100 N. Citrus Ave**

**Crystal River, FL 34428**

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## **SUMMARY OF QUALIFICATIONS**

Over 50+ years of hands-on experience as a financial consultant/planner/instructor/author.... Expertise has covered investment analysis and monitoring, estate and pension planning, living trusts, charitable gifting, sales and management (stocks, bonds, partnerships, insurance, REIT's and mutual funds), retirement planning, life and disability insurance review, securities arbitrations, taxation and national and international economic analysis. Provide expert testimony on brokerage and financial issues. Have written and taught extensively in the field.

Author

Financial Planning Fiduciary Standards under Dodd Frank 2012

The Failure of Securities Arbitration 2012

No Nonsense Finance 2003 1st edition; 2nd edition 2009

No Nonsense Finance 2003 1st edition; 2nd edition 2009

## **CURRENT ACTIVITY**

Consulting for individuals and businesses

Updating videos for Florida Bar and continuing education for consumers and industry..

Extensive use of Quora with 2,100,000 unsolicited and independent views from 2020 to 4/2021 regarding real estate, insurance, investments, fiduciary requirements, economics.

[Daily Commentary](#)- A compilation of economic and financial issues where current material is stored and used in subsequent work. Mostly at Masters Level.

Entire site reconstruction- current

## **PROFESSIONAL EXPERIENCE**

Professor/instructor for University of California at Berkeley and Irvine, University of San Francisco, Orange Coast, Santa Ana, Coastline and Scottsdale Community Colleges. Includes MBA course in Real Estate Finance, courses for the UC certificate programs "Professional Designation in Financial Planning" and "Professional Designation in Investment Real Estate" and specialized seminars. 1974-2000

## **LICENSES AND DESIGNATIONS**

PhD (Real Estate)

MSFP Masters of Science in Financial Planning (Estate Planning major)

LLB Bachelor of Law

MBA Masters in Business

Bachelor of Science in Civil Engineering

Series 65 Securities License (Multi State Adviser)

Licenses inactivated

Life and Disability Insurance Analyst California (One of 30)

Registered Investment Adviser

California Real Estate Broker

California B-1 General Contractor

Series 7, 24, 27 and 63 Securities Licenses

### **ARTICLES and PUBLICATIONS**

Authored courses accepted for securities continuing education in financial planning, estate planning, taxation and tax planning, investments and suitability, ethics, retirement planning and insurance and annuities.

Authored video course Fiduciary Standards under Dodd Frank: Investments

Authored video course Fiduciary Standards under Dodd Frank: Life Insurance and Annuities

Both accepted for Continuing Legal Education by the California State Bar

Authored course accepted for 4 hours of continuing education by the State Bar of California

"Practical Investment Theory and Application"

Authored two courses accepted for 4 and 16 hours of continuing education for Certified Public Accountants by the California Board of Accountancy. Previous course accepted for CPA credit in 10 states.

"Advanced Business Continuation and Estate Planning" "Advanced Financial Planning and Investing"

Authored two real estate courses granting 9 and 21 hours of continuing education by the California Department of Real Estate. Material was used in courses at several colleges including UC Irvine as part of Certificate program.

"Current Concepts of Real Estate and Investing"

"Major Concepts of Real Estate and Investing"