

Secure

financial services, inc

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Sean McDonough

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Professional Overview:

Sean has over 10 years of experience in securities related analytics. He joined Secure Financial Services, Inc., in July of 2008. He started out as an Investment Analyst learning the ins and outs of the Portfolio Perspective™ software. Over the years he has been grown to the Senior Analyst position. He has trained numerous analysts in the proprietary software. Sean has significant experience in managing and coordinating projects and developing unique solutions to financial and legal clients, including scheduling, costing, planning, prioritizing, and risk assessment. Sean's vast knowledge of investment analysis and expert witness consulting and testimony demonstrates his ability to serve as the conduit for all contract deliverables and as liaison to UBS.

Education:

- University of Vermont, Burlington, Vermont May, 2002
Bachelor of Arts in U.S. History and Business Administration

Relevant Experience/Training:

- Damages Expert testifying on internal process, procedures and interpretation of all product reports for FINRA and NYSE arbitrations. Ongoing
- Completion of SFS Annual Security Awareness Training 2017
- Successfully completed SFS Securities Damages curriculum 2008

Expert Testimony provided in the following cases:

- Jacobs v Fidelity Investments 05/2015

Qualifications:

- Account theory
- Concentration analysis
- Commission analysis
- Comprehending Profit & Loss work products
 - Data origination
 - Calculation and formulas used in securities analysis preparation
 - Data interpretation, presentation and techniques
 - Uncovering trading patterns and trends
- Program capabilities
- Report customization
- Positioning supplemental reports for arbitration
- Monthly statement analysis
- Proficient in Bloomberg Terminal
- Fluency in *Portfolio Perspective Analyst*™