




City of Seattle Boards & Commissions Notice of Appointment

Appointee Name: Jonathan Moore		
Board/Commission Name: Historic Seattle Preservation and Development Authority		Position Title: 16 - Member
<input checked="" type="checkbox"/> Appointment OR <input type="checkbox"/> Reappointment		City Council Confirmation required? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Appointing Authority: <input type="checkbox"/> City Council <input checked="" type="checkbox"/> Mayor <input type="checkbox"/> Other		Term of Position: * 12/1/24 to 11/30/27 <input checked="" type="checkbox"/> <i>Serving remaining term of a vacant position</i>
Residential Neighborhood: Greenwood	Zip Code: 98103	Contact Phone No.: [REDACTED]
Background: See resume attached.		
Authorizing Signature (original signature):  Date Signed (appointed): March 28th, 2025		Appointing Signatory: Bruce A. Harrell Mayor of Seattle

**Term begin and end date is fixed and tied to the position and not the appointment date.*

Jonathan Moore, CFA



PROFESSIONAL OVERVIEW

A skilled and customer focused portfolio manager who thrives in a highly competitive environment.

CORE COMPETENCIES

- | | | |
|-------------------------------------------|---------------------------------------|-------------------------------------------------|
| • Financial Research & Analysis | • Financial Models & Spreadsheets | • Report Development & Maintenance |
| • Business Banking & Liquidity Management | • Valuation & Performance Attribution | • Asset Allocation & Ad Hoc Portfolio Solutions |

PROFESSIONAL EXPERIENCE

Financial Advisor, UBS Financial Services, Seattle, WA 7/2024-Present

Sr. Wealth Strategy Associate, UBS Financial Services, Seattle, WA 10/2023-6/2024

Wealth Strategy Associate, UBS Financial Services, Seattle, WA 4/2020-9/2023

- Equity portfolio management, overseeing approximately \$400MM. Strategies include US Large-Cap, International Developed, Dividend Income and Small/Mid-Cap equities.
- Integrate ESG data to incorporate mission-aligned investing. Conduct proprietary research coupled with aggregated data from MSCI, Bloomberg, Refinitiv and S&P Global.
- Active portfolio implementation, rebalancing and tax loss harvesting, aimed at maximizing after-tax return. Risk mitigation and yield enhancement using options.
- Coordinate quarterly institutional reporting for international conservation endowments.
- Oversee third party manager performance evaluation and investment policy statement adherence.
- Present portfolio positioning in client meetings, highlighting current market trends and capital market assumptions.

Registered Client Service Associate, UBS/Paricion Wealth Management, Bellevue, WA 8/2018-4/2020

- Managed client requests for 47 UHNW households with accounts under management of \$450MM, with total team assets over \$1.2B.
- Set and implemented a successful plan to raise scores on our yearly client experience survey from 4.6/5.0 in 2018 to 4.8/5.0 in 2019.
- Communicated expectations and deadlines to multiple stakeholders (attorneys, investment bankers, and accountants) during business sale transactions, as part of the client acquisition process.
- Connected clients to assigned bankers and presented banking solutions tailored to their business banking needs.
- Managed a 5-stage 100-day post client acquisition onboarding process converting prospects to clients. Conducted 45- and 90-day review calls to ensure a smooth transition.

Client Service Associate, UBS Financial Services, Seattle, WA 11/2016-7/2018

- Supported two financial advisors who provided financial advice to over 100 client households with assets under management over \$250MM. Acted as the first point of contact.
- Responded promptly to action items generated by overnight internal reports including corporate actions, security redemptions and money transfer warnings.
- Prepared periodic performance reports for retail and institutional clients illustrating performance returns, income, dividends, interest, 12-month expected cash flow, and current vs. target allocation.

Jonathan Moore, CFA



Professional Caddie, Symetra Tour, LPGA Tour and Chambers Bay, University Place, WA 8/2013-12/2015

- Caddied for a professional women's golfer on the LPGA tour and in the 2014 US Women's Open.

AmeriCorps Member, Families Unlimited Network, University Place, WA, 9/2012-7/2013

- Successfully completed the 1700-hour, 10-month civil service AmeriCorps program by overseeing an afterschool program for grades K-8 for students from underprivileged backgrounds.

Campaign Intern, Karen Smitherman for City Council, Tacoma, WA, 5/2011-9/2011

- Researched the issue of mixed-use space in North Tacoma for the candidate.

Program Intern, Remann Hall Juvenile Center, Tacoma, WA, 5/2011-9/2011

- Provided administrative support to supervisors on scheduled court days.

EDUCATION

University of Redlands, Redlands, CA

B.A. International Relations, 2012

International Education of Students, Beijing, China

Study Abroad, Language Intensive, 2011

LICENSURE & CERTIFICATION

CFA® Charter holder, CFA Institute, April 2024

Securities License, Series 66, March 2018

Securities License, Series 7, December 2017

PERSONAL INTERESTS AND ADDITIONAL INFORMATION

- Former University of Redlands Golf Team Member
- Former First Tee of South Puget Sound Golf Instructor
- Hobbies include golfing, traveling and reading
 - Favorite Course – Royal Melbourne
 - Favorite Destination – Hoi An, Vietnam
 - Favorite Book – A People's History of The United States by Howard Zinn

Historic Seattle Preservation and Development Authority

18 Members: Pursuant to RCW 35.21.730 and SMC 3.110, all members subject to City Council confirmation, 3-year terms, however, due to restructuring of the board a 1-year transition provision is implemented until a stagger is created.

- 6 Mayor- appointed
- 12 Other Appointing Authority: 6- PDA Governing Council, 6- PDA Constituency

Roster:

*D	**G	RD	Position No.	Position Title	Name	Current Term Begin Date	Term End Date	Term #	Appointed By
6	M	2	1.	Ex Officio	David Yeaworth	12/1/20	11/30/24	2	Constituency
6	F	5	2.	Member	Stephanie Toothman	12/1/21	11/30/25	2	Mayor
6	M	4	3.	Member/ Vice Chair	Lorne McConachie	12/1/22	11/30/26	1	Constituency
			4.	Member	Vacant				Governing Council
2	M	N/A	5.	Member/ Chair	Kenny Pittman	12/1/20	11/30/24	1	Mayor
1	F	N/A	6.	Member/ Secretary	Mariko Park	12/1/21	11/30/25	2	Constituency
8	F	3	7.	Member	Taha Ebrahimi	12/1/20	11/30/24	1	Governing Council
6	F	N/A	8.	Member/ Treasurer	Katy Al-Khalidi	12/1/23	11/30/26	1	Governing Council
6	F	N/A	9.	Member	Karen True	12/1/21	11/30/25	2	Governing Council
6	M	N/A	10.	Member	Alistair Cerretti	12/1/24	11/30/27	1	Mayor
6	M	7	11.	Member	Rick Sever	12/1/23	11/30/24	5	Constituency
1	M	1	12.	Member	Raam D. Wong	12/1/24	11/30/27	1	Mayor
6	F	2	13.	Member	Angela Faul	12/1/23	11/30/26	1	Governing Council
6	F	2	14.	Member	Caroline Lemay	12/1/23	11/30/26	1	Governing Council
6	M	7	15.	Member	Bert Gregory	12/1/24	11/30/27	1	Constituency
2	M	5	16.	Member	Jonathan Moore	12/1/24	11/30/27	1	Mayor
6	F	2	17.	Member	Kimberly Kemp	12/1/23	11/30/26	1	Constituency
			18.	Member	Vacant	12/1/23	11/30/25		Mayor

SELF-IDENTIFIED DIVERSITY CHART

(1)

(2)

(3)

(4)

(5)

(6)

(7)

(8)

(9)

	Male	Female	Transgender	NB/ O/ U	Asian	Black/ African American	Hispanic/ Latino	American Indian/ Alaska Native	Other	Caucasian/ Non- Hispanic	Pacific Islander	Middle Eastern	Multiracial
Mayor	2	1			1	2				2			
Council	N/A	4								2		1	
Other	4	2			1					5			
Total	7	7			2	2				9		1	

Key:

***D** List the corresponding *Diversity Chart* number (1 through 9)

****G** List *gender*, **M**= Male, **F**= Female, **T**= Transgender, **NB**= Non-Binary, **O**= Other, **U**= Unknown

RD Residential Council District number 1 through 7 or N/A

Diversity information is self-identified and is voluntary.