



Frank Moore

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Frank Moore is the retirement plan consultant for CPI Qualified Plan Consultants, Inc. (CPI) covering the states of Alabama and Tennessee. He has been with CPI since January, 2011.



As retirement plan consultant, Mr. Moore represents CPI's retirement services with plan sponsors and their financial advisers as they design, develop, and enhance their qualified and nonqualified retirement plan programs. Mr. Moore has extensive experience in defined contribution plan design and investments.

With more than 20 years of industry experience, Mr. Moore began his career at Smith Barney providing investment and administrative consulting services to corporations and municipalities. Mr. Moore spent seven years with a regional third-party administrator in the southeastern United States where he rose to senior relationship manager for the firm's largest mutual fund family relationships and responsible for the development and deployment of co-branded and private label products offered by the mutual fund companies. In 2004 Mr. Moore joined American Funds where he initially served as relationship manager to trust companies and record keeping firms that provide services to qualified retirement plans. He ultimately became one of American Funds' original three oversight managers where he was responsible for performing annual on-site due diligence visits to analyze and prepare an assessment report on each intermediary's data-processing systems and procedures.

Mr. Moore received his Bachelor of Business Administration degree in Finance and Human Resource Management from The University of Montevallo. He is a graduate of the American Banking Association's Southern Trust School, and has served on the Investment Company Institute (ICI) Banks, Trusts, Administrators, Record Keepers (BTRAK) advisory board. He and his wife Ashley, and their two children, make their home in Birmingham, Alabama.