

Rob Morgan

rob@rbdgswg.me, (912) 464-4081

SUMMARY OF QUALIFICATIONS

- **Financial Systems Architecture:** Proven track record bridging technical IT infrastructure with treasury operations, converting manual, high-friction financial processes into secure, automated data pipelines.
- **Cloud Accounting & AI Automation:** Advanced practitioner in deploying modern accounting ecosystems (QuickBooks Online, Xero) and AI-driven workflows to eliminate administrative drag and accelerate operational scale.
- **Compliance & Treasury Controls:** Hands-on experience governing complex regulatory workflows, zero-margin-for-error records management, and enterprise database integrations.

PROFESSIONAL EXPERIENCE

U-Haul International September 2026 - Present

Remote Operational Risk & Systems Specialist

- **Database Triage:** Execute rapid-response resolution for complex, high-stakes logistical escalations, navigating proprietary databases to recover assets and prevent corporate revenue loss.
- **Risk Mitigation:** Manage ~20 complex, tier-2 system escalations daily, leveraging technical problem-solving and multi-monitor software workflows under high-pressure, time-sensitive conditions.
- **Data Integrity:** Maintain absolute zero-margin-for-error documentation while processing sensitive verification data, ensuring strict compliance with internal corporate audit standards.

Liberty Tax

August 2025 - May 2026

Seasonal Tax Operations Manager

- **Workflow Automation:** Spearheaded the overhaul of legacy, paper-driven file systems into streamlined, cloud-based data workflows, slashing client turnaround times and minimizing manual data-entry errors.
- **Operational Leadership & Compliance:** Managed daily branch operations, personnel, and compliance workflows for a high-volume financial services hub, guaranteeing strict alignment with IRS reporting standards.
- **Tech Stack Administration:** Acted as the on-site IT Systems Administrator, configuring local area networks, maintaining hardware, and ensuring 100% operational database uptime during peak tax season volume

TaxSlayer Pro

December 2024 - April 2025

Seasonal Remote B2B Tax Technology Specialist

- **Enterprise Software Support:** Directed advanced technical configuration support for enterprise-tier tax professional accounting suites, server database networks, and cloud environments.
- **Systems Architecture Logic:** Audited complex data pipelines, E-file processing sequences, and system logic errors to ensure seamless 100% IRS compliance for professional B2B tax firms.

Bank of America (via Apex Systems)

March 2022 - November 2022

Contract Implementation Advisor

- **Platform Configuration:** Managed the end-to-end launch and technical deployment of enterprise-level treasury management and commercial banking platforms for B2B corporate clients.
- **Compliance Auditing:** Performed exhaustive operational risk reviews, executing regulatory due diligence on organizational legal documents to validate secure financial system access.

EDUCATION

College of Coastal Georgia

Brunswick, GA

Bachelor of Science Accounting

December 2027

CERTIFICATIONS

Financial

Intuit Bookkeeper Certified | Xero Advisor Certified | QuickBooks Online Payroll

Technical & Management

Google Project Management | Google AI Professional | CompTIA A+ | Google IT Support