



Greyson Charles

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SUMMARY

Passionate about financial planning and client services, eager to contribute during my internship. Developed comprehensive plans in previous roles, aligning with clients' financial goals and preferences. My experience ensuring accurate data handling coupled with strong communication skills positions me well to assist your team. Dedicated to learning advanced financial strategies through active participation in meetings and networking events. Interested in developing systems that enhance client services and streamline reporting processes. Committed to ethical financial practices while contributing positively to the team's success and growth initiatives.

EDUCATION

Bachelor of Science in Finance

University of Illinois GPA: 3.8

2024

Champaign, IL

Coursework: Financial Management, Investment Analysis, Personal Financial Planning, Business Ethics

TECHNICAL SKILLS

- **Financial Tools:** QuickBooks, Bloomberg Terminal, TurboTax
- **Data Analysis Software:** Tableau, Microsoft Power BI, SAS
- **Office Software:** Microsoft Word, Google Suite, Outlook
- **CRM Systems:** Salesforce, Zoho CRM, HubSpot
- **Collaboration Tools:** Slack, Microsoft Teams, Zoom
- **Project Management Tools:** Trello, Asana, JIRA
- **Research Methodologies:** Primary Research, Secondary Research, Case Studies
- **Visual Presentation Tools:** Canva, Prezi, Google Slides
- **Statistical Tools:** SPSS, Minitab, R
- **Survey Tools:** SurveyMonkey, Typeform, Google Forms

SKILLS

- Financial Analysis
- Client Relationship Management
- Microsoft Excel
- Data Visualization
- Strategic Planning
- Budgeting Guidelines
- Risk Assessment
- Regulatory Compliance
- Business Operations
- Communication Skills
- Team Collaboration
- Research Techniques
- Presentation Skills
- Reporting Standards
- Workflow Optimization

EXPERIENCE

Financial Analyst

Future Vision Finance

June 2024 - Present

Chicago, IL

As a Financial Analyst, developed growth-oriented financial plans for various clients, ensuring objectives matched their aspirations. Hands-on market research informed investment strategies while collaborating effectively across teams enhanced service delivery.

- Created tailored financial roadmaps that align client investments with personal goals.
- Conducted thorough analyses of market trends impacting clients' portfolios.
- Partnered with cross-functional teams for streamlined service enhancement.
- Delivered clear presentations outlining financial outcomes and projections.

Financial Planning Intern

Wealth Management Partners

January 2023 - May 2024

Peoria, IL

In this role, assisted in crafting financial reports and presented insights during client engagement, focusing on strategic plan development based on individual needs. Gained proficiency in software tools that facilitated effective portfolio creation.

- Supported prevalent client meetings, gathering insights for actionable financial recommendations.
- Engaged in detailed report preparations showcasing financial standings.
- Utilized financial software to analyze data improving operational effectiveness.
- Contributed ideas for innovative presentation formats during client briefings.

LEADERSHIP & AWARDS

- Dean's List, University of Illinois (2022)
- Best Capstone Project Award (2023)

CERTIFICATIONS

- SIE License 📅 2026
- Series 63 (in progress) 📅 2026

PROFESSIONAL AFFILIATIONS

- Finance Club Member, University of Illinois
- Volunteer, Local Community Financial Literacy Programs

LANGUAGES

- English (Native) • Spanish (Proficient)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST