



Greyson Charles

Financial Advising Intern

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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

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.

STRENGTHS



Adaptability

Thrived in diverse environments; embraced new challenges with enthusiasm. Daily adjustments became second nature as team dynamics shifted.



Analytical Thinking

Applied sharp analytical skills in financial scenarios; often recognized for finding innovative solutions amidst complex datasets.



Collaboration

Fostered strong connections within teams. Peers frequently sought advice, demonstrating trust built on respect and shared commitment.



Effective Communication

Articulated financial concepts clearly; engaged audiences in discussions fostering a deeper understanding among various stakeholders.



Client-Focused Approach

Prioritized client perspectives in planning steps; translated complex information into actionable insights, gaining executive confidence.

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

LANGUAGES

English Native

Spanish Proficient

MY CAREER



● Financial Analyst at Future Vision Finance (2 Years)

● Financial Planning Intern at Wealth Management Partners (1.3 Years)

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

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST