

Charles Daugherty

Idaho Falls, ID
carsondaugherty30@gmail.com
(208)589-4649

Summary

I am a dedicated and results-oriented Associate Advisor with a proven track record of excellence in supporting financial advisors and delivering exceptional service to clients. I am excited about the opportunity to join a great firm and contribute to the team's success. With my background in client meetings, proficiency in financial planning software, and strong teamwork skills, I am confident I can significantly impact this role.

Experience

Financial Advisor Intern

Treasure Valley Financial Planning • Boise, ID
05/2023 - 07/2023

- Collaborated with senior advisors to gather client information and conducted financial needs assessments to identify suitable investment strategies.
- Responded promptly and professionally to client inquiries, addressing their concerns and providing accurate information.
- Utilized financial software and tools to generate reports, analyze data, and present findings to senior advisors and clients.

Bank Teller

D.L. Evans Bank • Ammon, ID
03/2022 - 05/2023

- Demonstrated success in delivering outstanding customer service and managing transactions accurately.
- Possess exceptional communication skills, effectively identifying customer needs and offering relevant products and services
- Proficient in using modern banking software and technology, offering a solid foundation in this area

Customer Service Representative

Melaleuca | ID, Rexburg
01/2021 - 03/2022

- Developed and implemented customer service standards that improved customer satisfaction by 10%
 - I was on the phone and was in charge of making a personal connection with the customer and helping them solve their problems by presenting solutions to enhance their lives and others.
 - Helped customers find products that would best benefit them and their everyday lives
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Education

Finance

Brigham Young University- Idaho • Rexburg, ID
07/2024

- Minor in Financial Planning
- Graduated GPA 3.7
- Member of Wealth Management Society

Business Administration

University of Oregon Eugene • Eugene
06/2018

- WARSAW Sports Business Club
