

Alyse Curran

Charles Schwab Financial Consultant,
Charles Schwab & Co., Inc.

charles
SCHWAB

Own your tomorrow™



Alyse Curran

VP - Financial Consultant

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Professional Profile

I can partner with you to understand your goals, create a personalized plan, and provide investing guidance. You'll understand where your money is invested and why, how your investments are performing, and how much it's costing you. Plus you'll have access to Schwab's portfolio management expertise, insights, and specialists. It's a modern approach to wealth management—so you can take ownership of your financial life.

Financial Credentials

- Series 7, 66 Securities Licenses
- Life & Variable Annuity Insurance License

Experience

- 15 years of professional experience
- VP - Financial Consultant, Charles Schwab, 2017-present
- Associate Financial Consultant, Charles Schwab, 2015-2017
- Loan Administrative Assistant III, Northrim Bank, 2012-2015
- Branch Supervisor, Northrim Bank, 2010-2012
- Branch Lead, Northrim Bank, 2009-2010
- Teller, Northrim Bank, 2007-2009

Education

- BA, Finance , UAA
- BA, Business Management, UAA

Brokerage Products: Not FDIC Insured ▪ No Bank Guarantee ▪ May Lose Value

There are eligibility requirements to work with a dedicated Financial Consultant.

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Wealth management refers to products and services available through the operating subsidiaries of The Charles Schwab Corporation of which there are important differences including, but not limited to, the type of advice and assistance provided, fees charged, and the rights and obligations of the parties. It is important to understand the differences when determining which products and/or services to select.

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