



CHARITY A. SWAN

SENIOR CLIENT CARE ASSOCIATE

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My Net Worthwhile® is helping others find the path to their goals.

With a unique ability to approach complex financial situations with a resourceful bent, Charity works closely with relationship managers and other team members to help clients reach and exceed their goals. Striving to ensure clients receive exceptional service, Charity provides comprehensive account support services, including researching and responding to client inquiries, processing account openings and closings, assisting with account distributions, and portfolio accounting and reporting.

Before joining SignatureFD, Charity worked for Frazier & Deeter LLC, providing administrative and technical support services. She holds a Bachelor of Arts in Psychology from the University of South Florida.