BOARD OF DIRECTORS: CANDIDATE APPLICATION

Candidate Information

Name: JOSEPH DADASHADEH
Board Seat position # seeking (list only one): SEAT# 1
How are you affiliated with North Star Charter School?: I have two children attending NSCS.

Biography (introduce yourself in 150 words or less)

My family and I lived in San Jose, CA for 18 years, before moving to Eagle in 2018. My wife, Ramona, and I have been married for 18 years, and we are blessed with 3 children. I was born in an Assyrian/Christian family in Iran and studied civil engineering, before moving to US in 2000. I have a bachelor's degree in business administration/finance from University of Phoenix. I've been working in the financial industry for over 20 years and most recently working as Sr. Financial advisor for Wells Fargo Advisors, in Eagle. As a financial services professional, I hold Series 6,7, 63,66 securities licenses, as well as Idaho, Oregon, California, and Washington life and health insurance licenses. Additionally, I am a Certified Wealth Strategist through Cannon Financial Institute.
Away from the office, I am active in youth sports, and I love the outdoors. I enjoy traveling, fishing, camping, and hiking.

Candidate Questions:

1. How did you hear about this position?

School's email newsletter

2. Would you consider yourself supportive of school choice?

Yes, I would.

3. What is your knowledge of charter schools in Idaho or elsewhere?

I understand that Charter schools are public schools and publicly funded, and that they are governed by their own board of directors, which has the duty to manage and supervise the operations of the school.

4. Based on North Star's charter and bylaws, what do you understand to be the aspirations of the school?

NSCS aspires to provide its students the best education possible, to encourage superior academic achievements. Founders envisioned the school to produce critical thinkers that one day become leaders in their local and world community.

5. In what ways have you participated in supporting North Star (e.g. PTO, fundraising, volunteering, etc) ?

My wife and I have participated in fundraising as well as volunteering for school activities.

6. What are your observations of what's going well at the school?

I do believe that the school is doing a great job achieving its goals in providing a great learning environment and a world class educational program.

7. What do you believe are opportunities for improvement for the school?

Based on my personal experience, NSCS, in general, does a great job teaching students and facilitating an environment for kids to excel academically. However, I believe there are 3 areas of opportunity that if implemented, would make our school even better. Attracting and retaining most talented teachers, retaining more of the school's students as they move up in grade levels, creating a more professional school environment.

Attract and Retain Talent:

A big part of investing in our kid's future, in my opinion, is to attract and retain most talented teachers. We can achieve that by making sure that we are second to none, when it comes to teacher's pay as well as creating a professional and respectful work environment for our teachers.

Retain Students:

Based on my conversations with a few students, it seems like the school is limited on its electives offering. I would love to explore the possibility of adding a few more elective courses, if possible. Additionally, having attended a few school events, I do believe that we have room to improve the number of school events, such as field trips and dances etc., as well as the quality of the events. I know that such activities, if planned and funded properly, can bring kids and their parents closer together and create a community feel.

Professional School Environment:

I would like to see adoption of a stricter student dress code for our middle and high school students. I believe that proper dress code would bring us closer to a more professional feeling school. I have noticed that a lot of students attending the school (including my own 8th grader) basically in their pajamas. I believe that school should not feel like home. It should feel like an important and professional learning institution, which it is. A place where kids come to learn while respecting the institution as well as its faculty. I am not calling for uniforms. However, pajamas are for home and bedtime. In my opinion, proper school attire would bring a sense of pride and seriousness to the school and would help push kids out of their comfort zone and ready to learn.

8. Have you attended any North Star Board meetings? How many?

Yes, only 1.

9. What background, experience, or skills can you offer as a potential Board member?

Having experienced educational system in two different countries, and two different states in the US, gives me a unique prospective to look at issues from multiple different lenses. Additionally, my education and employment background are closely aligned with school curriculum's emphasis on business and economics.

10. Do you have any potential/perceived conflict(s) of interest that could be in question while serving on the Board?

None.

Joseph Dadashadeh

A dynamic advisor that utilizes knowledge, leadership, and teamwork in identifying customer needs to offer perfect solutions that create lasting relationships and customer loyalty.

Licenses and Certificates

2010 State of California Life Agent License
2010 State of California Accident & Health Agent
2018 State of Idaho Life Agent License
2018 State of Idaho Accident & Health Agent
2018 State of Oregon Life Agent License
2018 State of Oregon Accident & Health Agent
2018 State of Washington Life Agent License
2018 State of Washington Accident & Health Agent
2010 Series 6 & Series 63
2012 Series 7
2014 Series 66
2015 CWS Designation

Additional Areas of Expertise

Strong Partnership Skills ~ Strong Communication Skills ~ Exceptional Organizational Skills
Client Development/Relations ~ Product Promotions ~ Client Proposals/Presentations
Product Knowledge ~ Microsoft Office ~ Effective Coach ~ Multilingual (English, Farsi, Assyrian, and Turkish) ~ Detail Oriented

Employment Experience

April 2022 – Present
Wells Fargo Advisors, *Sr. Financial Advisor, VP*

- Managed high net worth client relationships within Eagle, ID market
- Exceptional financial planning skills through eMoney financial planning software
- Holistic client relationship approach to successfully deepen relationships
- Manage a portfolio of client relationships with a focus on $250K to $50M AUM
- Strong business development skills in acquiring/maintaining client relationships
- Deep understanding of financial markets and economic cycles
- Superb communication, organizational, and prioritization skills
- Effective financial/retirement planning around protection, growth, and income strategies
- Maintained a great relationship with business partners

August 2018 – Present
Bank of the West, Wealth Management Group, *VP, Sr. Private Client Advisor II & Wealth Financial Advisor*

- Managed high net worth client relationships with a holistic approach
- Provided coverage to a large territory of Idaho, eastern Oregon and eastern Washington
- Maintained a great relationship with business partners
- Met and exceeded production goals
- Planning and holistic client relationship approach to successfully deepen relationships
- Proficient in use of Money Guide Pro software to build comprehensive financial plans
- Proficient use of MS Dynamics CRM to manage and maintain client relationships
- Manage a portfolio of client relationships with a focus on $250K to $25M AUM

- Strong business development skills in acquiring/maintaining client relationships
- Strong people skills to build long lasting client relationships
- Trust & Estate planning, retirement & investment planning, deposit & lending solutions

May 2017 – July 2018
Fidelity Investments, *Fidelity Personal & Workplace Investing, Financial Consultant*
- Superb communication, organizational, and prioritization skills
- Deep understanding of the financial markets
- Proficient knowledge and effective utilization of Salesforce CRM
- Manage a $300 million book of business including $80 million managed solutions
- Effectively simplify financial concepts while building credibility w/high net worth clients
- Exceptional knowledge of investment/financial planning products
- Superb at profiling & understanding client's financial picture
- Leveraging planning & guidance tools to thoroughly analyze current financial situation
- Strong financial/retirement planning around protection, growth, and income strategies
- Effective presentation skills to implement investment strategies

June 2014 – May 2017
Bank of the West, Wealth Management Group, *VP, Sr. Private Client Advisor II*
- Act as the primary point of contact for bank's high income/net-worth clients
- Nominated as MS Dynamics CRM advocate to learn the tool and coach others
- Proficient use of MS Dynamics CRM to manage and maintain BOB
- Manage a portfolio of client relationships with a focus on $3M to $15M AUM
- Strong business development skills in acquiring/maintaining client relationships
- Holistic approach when advising clients in financial matters
- Trust & Estate planning, retirement & investment planning, deposit & lending solutions
- Effectively partnering w/SMEs to find suitable financial solutions for specific client needs

Apr 2010 – June 2014
Wells Fargo Advisors, *Brokerage Associate*
- Outbound phone call marketing to bank high value clients for investment opportunities
- Meeting new clients through branch referrals and uncovering financial needs
- Profiling customers for Cross-sell *Financial Advisor* opportunities and referrals

Apr 2012 – June 2014
Wells Fargo Bank, *Senior Private Banker II*
- Manage a *Book of Business* consistent of 350+ affluent market segment clients
- Deposit growth within the book of business
- Generate, submit, and close secured and unsecured loans and lines of credit
- Profile existing and new clients for business lending opportunities
- Profile customers to identify and produce investment referrals to financial advisor
- Profile customers to identify and produce mortgage referrals

Sep 2008 – Apr 2012
Wells Fargo Bank, *Premier Banker*
- New personal/business account relationships and convenient services
- Identify, generate, and close secured and unsecured loans and lines of credit
- Maintain and strengthen current client relationships and develop new relationships
- Build strong partnerships within bank to identify and match cross-sell opportunities
- Excellent verbal/written communication, presentation and organizational skills

Oct 2007 – Sep 2008
Wells Fargo Home Mortgage, *Home Mortgage Consultant*
- Marketing, Generating and Closing Prime Residential mortgage loans

- Marketing and Maintaining relationships with real estate agents
- Maintaining relationship/partnership with over 20 realtors
- Maintaining over 400 past client relationships
- Excellent verbal/written communication, presentation and organizational skills

Nov 2006 – Sep 2007
Bank of America Mortgage*, Mortgage Loan Officer*

- Marketing, Generating and Closing Prime Residential mortgage loans
- Marketing and working relationships with real estate agents
- Maintaining relationship/partnership with over 20 realtors
- Maintaining over 300 past client relationships
- Excellent verbal/written communication, presentation and organizational skills

Education

- Axia College of University of Phoenix – Associate degree
- University of Phoenix – BS in Business Administration-Finance
- Cannon Financial Institute - Certified Wealth Strategist