



Contact

Phone

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Email

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Address

2215 Virginia Ave
Eustis, FL 32726

Education

2020

Bachelor of Science in Business Systems and Processes
Minor in Accounting

Towson University

Relevant Coursework

ERP Simulation and Applications - Practical use of SAP S4Hana to setup cloud-based manufacturing, financial, and security modules

ERP Systems Configuration - Learned business process of modern organizations, managing process changes, and configuring an ERP system to implement those changes

Supply Chain Management - Developed a good understanding of strategic, tactical and operational issues of SCM and became familiar with the integration of various SCM entities.

Skills

- SAP
- CRM Systems
- ERP Accounting
- Microsoft Excel
- Technological Knowledge
- Critical Thinking
- Problem Solving

Chase Waganer

ERP Business Analyst

Dedicated worker with excellent communication, time management and computer skills. Aiming to leverage my abilities to successfully fill the vacancy at your company. Frequently trusted by peers to resolve computer and technology issues, I can be relied upon to help your company achieve its goals.

Experience

April 2021 - August 2021

LaPorte Financial - Winter Garden, Florida

Junior Financial Advisor

- Implemented two financial planning tools into the practice to increase positive client outcomes.
- Utilized Excel spreadsheets and other planning databases (MoneyGuide Pro, Emoney, and Redtail CRM) to build and outline clients financial plans.
- Determined if plan reassessment was required by analyzing life changes, economic changes, environmental concerns, and financial performance.
- Used problem solving and analytical skills to adjust our clients financial plans to handle their concerns.
- Recommended to clients strategies in cash management, insurance coverage, investment planning and other areas to help them achieve financial goals.

March 2020 - November 2020

Florida Financial Advisors - Orlando, Florida

Financial Consultant

- Implemented the Hubspot CRM for my personal use to maintain and track client conversations and meetings
- Monitored financial market trends to ensure that client plans were responsive.
- Recruited and maintained client relationships.

July 2016 - March 2020

Allroads Company - Baltimore, Maryland

Management Intern

- Maintained database of customer accounts through "CDK" and "Dealersocket".
- Investigated products and markets to determine areas for opportunity.
- Prepared reports to summarize operational results and financial performance.
- Used financial accounting and spreadsheet software to calculate revenue, sales and expenses.
- Analyzed corporate intelligence data to identify trends and patterns.
- Utilized "DealerSocket" an automotive CRM system to effectively track and monitor current or potential customers.
- Established training initiatives to increase new dealership sales by 300%

Reference

Andy Franklin

CEO, All Roads Company

Phone: 443-677-3085

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Riley Thompson

General Manager, All Roads Company

Phone: 443-223-7643

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