Current Address:
141 S. Garner Street #306
State College, PA 16801

Zach Waller

zbw5024@psu.edu
203-885-2931

Permanent Address:
230 Winton Road
Fairfield, CT 06824

Education

The Pennsylvania State University, **Smeal College of Business** — **University Park, PA**
Bachelor of Science in Finance — *Class of 2018*
Sequence in Risk Management: Real Estate — Dean's List - Cumulative GPA: 3.6

Work Experience

Northwestern Mutual — **Westport, CT**
College Financial Representative — *Summer 2017*

- Provided professional guidance and personalized solutions to high net worth individuals in the areas of risk management wealth accumulation, and wealth preservation & distribution
- Developed high trust relationships centered around client values and specific goals in alignment with fiduciary responsibility
- Licensed in Life, Accident & Health Insurance in the state of Connecticut

Bender Plumbing Supply — **New Haven, CT**
Operations Intern — *Summer 2016*

- Spearheaded a Warehouse Management System (WMS) implementation project for a rapidly growing distributor of plumbing, heating, ventilation, air conditioning, kitchen, and bath products
- Took the lead role in analyzing and mapping, through independent judgment, product storage and order picking locations for the WMS throughout 8 different Connecticut locations with the end goal of reducing operating costs
- Gained valuable knowledge of how a rapidly growing company with multiple branches operates by working alongside the Chief Operating Officer and ERP Systems Manager

DDI System — **Sandy Hook, CT**
Marketing Assistant — *Summer 2015*

- Conducted online research to validate and improve the quality of marketing and sales leads that efforts were invested in
- Corrected client lead information in validated records in over 80% of cases
- Exercised independent judgement on obsolete or invalid records and effectively cleaned the CRM database

Relevant Experience and Affiliations

Beta Alpha Psi Business Fraternity — **University Park, PA**
New Member Candidate — *Fall 2017 – Present*

- Developing professional friendships and relationships through various networking activities
- Participates in several other types of events such as service, technology and fund-raising activities

Tau Kappa Epsilon Fraternity (Pi Chapter) — **University Park, PA**
Executive Vice President — *Spring 2015– Fall 2016*

- Served as kitchen staff liaison helping forecast and manage a near $100,000 per semester food budget
- Actively involved in THON, the largest student run philanthropy in the world, which helped raise more than $10 million in 2017 with proceeds going to the Four Diamonds Fund at Penn State Hershey's Children's Hospital

Homecoming Chairman — *Fall 2015*

- Organized an event which aims to celebrate tradition and instill pride in all members of the Penn State community
- Designed and conducted a mass apparel order that totaled a value of over $1,000

Wall Street Journal Business Association — **University Park, PA**
Club Member — *Fall 2015 – Fall 2016*

- Discussed relevant national and international current events relating to business
- Explored trends and business decisions that help bridge gap between classroom concepts and real-world events

Skills

- Financial advisory, organization, communication, analytical, critical thinking
- Microsoft Office proficiency, ERP system knowledge, typing (~80 wpm)

Honors / Interests

- Dean's List, Newtown High School all SWC Ice Hockey Academic Team Award (2011-2014)
- Fitness, music, investing, socializing, snowboarding, ice hockey (high school captain)