

NATHAN HANEY

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📞 913.461.0269

EDUCATION

Degree: Personal Financial Planning
Certificate: Professional Strategic Selling
Kansas State University | Manhattan, KS

Expected: Dec 2025

- GPA 3.625 (4.0 in PFP)

RELEVANT EXPERIENCE

Vice President of Finance

Delta Upsilon | Manhattan, KS

April 2024 - Present

- Manage the fraternity's financial operations, overseeing budgeting, accounting, and financial reporting processes to ensure transparency and fiscal responsibility.
- Maintain accurate financial records that enable effective tracking of income and expenditures.
- Conduct periodic meetings with the alumni board to deliver comprehensive financial presentations and reports, providing transparent insight into my fraternity's financial performance.
- Work with peers that require financial assistance to create individualized payment plans for each dues cycle.

Peer Financial Counselor

Powercat Financial | Manhattan, KS

Nov 2023 - Present

- Peer counselors provide free, confidential assistance, and counseling to Kansas State University students.
- Peer counselors provide one-on-one financial counseling sessions to students, offering guidance on budgeting, debt management, student loans, savings strategies, and building education financial plans.
- Facilitated interactive workshops and presentations on various financial topics to increase the financial literacy at Kansas State.
- Helped train new peer financial counselors by allowing them to shadow client meetings and organizing co-counseling sessions where experienced peer financial counselors would observe the incoming peer financial counselors during client meetings.

Financial Planning Intern

Dogwood Wealth Management | Lenexa, KS

May 2024 - Aug 2024

- Spearheaded a project involving an AI program called Jump AI that automates meeting preparation, meeting notes, and meeting follow up items, significantly reducing manual tasks allowing for a more efficient workplace.
- Completed data entry and conducted case analysis using financial planning software applications such as eMoney, Holistiplan, and estate planning software, ensuring accuracy and completeness of client information and financial plans.
- Attended client meetings alongside advisors, actively listening and taking detailed notes to capture the important discussion points, action items, and client preferences.

Intern

Financial Partners Group | Overland Park, KS

May 2023 - Jan 2024

- Used eMoney financial planning software to assist senior advisors in creating comprehensive retirement plans for prospective clients, incorporating factors such as income, expenses, assets, and retirement goals.
- Conducted in-depth analysis and screening of funds and securities using Morningstar, evaluating factors such as performance, risk, expense ratios, and investment strategy to assist the senior investment officer in selecting investments for client portfolios.
- Completed various tasks in Redtail CRM system to support senior advisors in maintaining accurate client records, scheduling appointments, and managing communication to enhance efficiently and organization in client interactions.

WORK EXPERIENCE

Owner

Haney Lawn Care | Kansas City, KS

Feb 2016 - Sep 2023

- Launched and managed a lawn care business, overseeing all aspects of operations, from initial client consulting to delivering the lawncare service and follow-up.
- Cultivated strong client relationships through effective communication, professionalism, and personalized service, this resulted in a high rate of customer retention and referrals.
- Directed all aspects of lawn care services, including mowing, edging, and trimming to meet the client's quality standards.

LEADERSHIP & ACTIVITIES

Treasurer

Chimes Junior Honorary Society

April 2024 - Present

Member

Financial Services Leadership Institute

Nov 2023 - Present

V.P. of Finance

Silver Key Sophomore Honorary Society

April 2023 - April 2024

Dean's List

Fall 2023, Spring 2024