

Eric B. Waggoner, CFA[®], CFP[®], CLU[®], ChFC[®], AEP[®]

Managing Director & Wealth Management Advisor

Waggoner Financial Group

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Education:

<i>M.S. in Mathematics</i> , Michigan State University, East Lansing, MI	2003
<i>B.S. in Mathematics</i> , Michigan State University, East Lansing, MI	2000
<i>B.S. in Astrophysics</i> , Michigan State University, East Lansing, MI	2007

Professional Designations:

Chartered Financial Analyst (CFA)

Certified Financial Planner (CFP)

Chartered Financial Consultant (ChFC)

Chartered Life Underwriter (CLU)

Accredited Estate Planner (AEP)

Academic Appointments:

<i>Adjunct Professor</i> , Department of Finance, Michigan State University	2017 – Present
<i>Adjunct Professor</i> , Department of Mathematics/Physics, Lansing Community College	2002 – 2007
<i>Graduate Teaching Assistant</i> , Department of Mathematics, Michigan State University	2001 – 2007

Courses Taught:

Michigan State University:

- MTH 103 – College Algebra
- MTH 124 – Business Calculus
- MTH 201 – Mathematics for Teachers
- MTH 309 – Linear Algebra
- MTH 410 – Euclidean Geometry
- STT 441 – Probability and Statistics
- FI 380 – Principles of Insurance and Risk Management
- FI 481 – Crises, Insurance and Risk Management

Lansing Community College:

- MATH 151 – Calculus: Differentiation and Integration
- MATH 152 – Infinite Sequences and Series
- MATH 155 – Algebra and Trigonometry
- MATH 161 – Honors Calculus
- MATH 253 – Multivariable Calculus
- MATH 254 – Differential Equations
- PHYS 251 – Physics I with Calculus (Electricity)
- PHYS 252 – Physics II with Calculus (Magnetism)

Professional Experience:

Managing Director & Wealth Management Advisor 2008 – Present
Waggoner Financial Group, East Lansing, MI

- Manage a district office and corporation that was recognized for Outstanding Achievement in Recruiting and Sales (OARS) by recruiting, training, and developing financial advisors, college interns, and support personnel.
- Implement professional investment portfolio management for over \$50 million in assets, ranking in excess of the 90th percentile within Northwestern Mutual.

Adjunct Professor 2002 – 2007
Lansing Community College, Lansing, MI

- Developed curriculum and taught courses in the Mathematics and Computer Sciences department.

Graduate Instructor 2001 – 2007
Michigan State University, East Lansing, MI

- Taught Mathematics courses, revised educational materials, and lectured on teaching methodology.

Intern Summer 2001
First Investors Corporation, Northville, MI

- Counseled clients on financial objectives and offered services through investment products.
- Obtained *Series 6, Series 63 and Michigan Life Insurance* licenses.

Awards

Financial Representative of the Year (Four-Time), Northwestern Mutual – Western Michigan 2013; 2015 – 2017

Managing Director of the Year (Two-Time), Northwestern Mutual – Western Michigan 2016 – 2017

First Place College Recruiting District, Northwestern Mutual 2017

Lives Leader Summit Qualifier, Northwestern Mutual 2012 – 2015; 2017

Outstanding Achievement in Recruiting and Sales (OARS), Northwestern Mutual 2016

Conferences Attended:

CFA Institute Annual Conference, Hong Kong, Hong Kong 2018

Managing Directors Conference, Various Locations 2012 – 2018

Lives Leader Summit, Various Locations 2012 – 2018

Leadership Next Conference, Various Locations 2015 – 2018

Finance for Executives (Two-Day Workshop), Michigan State University, East Lansing, MI 2017

Presentations

Prosper: Financial Education Presentation, FBI Headquarters, Washington, D.C. 2018

Northwestern Mutual Retirement Planning Panel, Milwaukee, WI 2015

Memberships

CFA Institute

National Association of Insurance and Financial Advisors (NAIFA)

National Association of Estate Counselors and Planners (NAEPC)

University Club of Michigan State University

Lansing Regional Chamber of Commerce