

Dan Chase
Partner



Select Executive Experience

Happy Trailer Sales (2023-Present)
CFO

Moore Transport of Tulsa (2022-2023)
CFO

Endurance Environmental (2021-2022)
CFO

Holiday World of Houston (2019-2020)
CFO

Motor Home Specialist (2018-2019)
VP and Controller

Summit Truck Group (2015-2016)
VP of Lease and Rental

Bruckner Truck & Equipment (2012-2013)
Operations Manager - Lease & Rental

Lonestar Truck Group (2000-2010)
CFO

Core Competencies

CFO
Owner/Entrepreneur
Mergers and Acquisitions
Post-Merger Integration
Dealership ERP System Evaluation and Implementation
Multi-State/Multi-Location
KPI Development & Dashboards
Budgeting and Forecasting
Family Business Dynamics
Regulatory Compliance

Education & Certifications

MBA, Finance
Indiana University (Minor in Transportation)

BS, Accounting
Indiana University

Executive Profile

Dan Chase is a partner in the Dallas office of SeatonHill. Mr. Chase has over 30 years of experience within CFO, COO, and ownership capacities serving a wide variety of businesses with emphasis on large multi-state dealerships, vehicle leasing organizations, logistic companies, and retail operations. He has worked with 1000+ employee truck dealerships, the #1 volume RV dealer in the country, and truck lease and rental organizations with fleets exceeding 1,600 vehicles. In all these organizations, he helped develop strategy and implement profit driven resource alignment that measured performance and accountability across each company and their various locations. Key areas of expertise include dealership ERP system evaluation and implementation, mergers and acquisitions, transportation and logistics' financial operations, post-merger integration, equipment financing, working capital, banking relationships, treasury management, KPI development, and dashboards.

Industry Experience

Dealerships (RV, Trailers, Motorcycle, Marine, Power Sports, etc.)
Dealerships (Automotive, Truck, Class 3 to Class 8 Trucks, Trailers, BHPH (Buy Here/Pay Here))
Dealership Departmental Gross Profit Analysis
Truck Transportation / Logistics / Warehousing
Household Goods Mover
Lease and Rental Operations (Truck, Trailer, Auto, RV, etc.)
Unit Profitability and Transportation Lane Analysis
Retail and Service Industries



Our partners have deep experience across multiple industries, and can quickly integrate into your organization to provide the insights you need to succeed in today's marketplace.

Key Experience

Happy Trailer Sales: As the CFO, Dan implemented procedures to rectify previous GAAP reporting deficiencies, so all accounting transactions were reported according to GAAP guidelines. He upgraded the dealership reporting activities to focus on departmental Gross Profit objectives. Dan was instrumental in analyzing potential M&A candidates, assisting with structuring financing for strategic acquisitions, and managing the financial post-merger integration implementation. He negotiated a new Open Lot / Rental insurance policy that saved \$260K per year.

Endurance Environmental: As the CFO for this P/E backed, \$110 million revenue municipal waste hauler with 400+ power units, 850+ trailers and 100+ heavy equipment vehicles, acquired in a "Section 9" foreclosure, Dan led the organization's accounting and financial reporting activities. He analyzed the organization's fuel costs and found that nearly 70% of all fuel purchases were paid at the full retail price. Dan negotiated a cost-plus fuel discount program, which significantly reduced fuel costs. Total annual savings for the cost-plus fuel program and installing bulk fuel tanks at the large terminals amounted to \$1.2M. He also reviewed the workers' comp. insurance and found a major employee misclassification for drivers. After analyzing the multi-state ramifications, Dan obtained a premium refund of \$325K during the audit year and reduced premiums in the current year by another \$325K.

Motor Home Specialist: As VP and Controller for this #1 volume RV dealership in the country, Dan performed post-acquisition integration activities relating to financial reporting, system integration, and process & procedure improvements. He created a financial modeling budget template utilized by multiple entities. Dan also analyzed credit card processing costs and found a new provider with \$200,000 in annual savings in addition to actively managing \$100 million in floor plan financing.

Moore Transport of Tulsa, LLC: As the CFO for this \$75 million revenue auto hauler that operated in 13 states and hauled new vehicles from the manufacturer to the dealership for BMW, GM, Toyota, Stellantis, and Mercedes, which operated under a forbearance agreement with its Private Equity owner, Dan provided financial reporting and analysis to the P/E owner. He also performed lane analysis, which allowed the organization to substantiate the need for 10% to 20% rate increases.

Summit Truck Group: As VP of Lease and Rental for this 1,300 employee, 38 locations, International and Kenworth Dealership, which operated 1600+ vehicles across 18 locations, Dan was responsible for managing all aspects of the Lease and Rental Operations and reported to the COO. Dan also negotiated financing for all new lease equipment purchases with 8 banks (305 units, \$26.5 million), He acquired key management and sales personnel to improve and enhance the sales and management teams. Dan was part of a select group that evaluated new ERP systems for the entire organization.

Bruckner: As Operations Manager for the largest Mack/Volvo Leasing Group in the country with over 8 locations, Dan managed operations and financial reporting for this regional, multi-state truck lease & rental company. He also created key KPI's to identify problems so process improvement strategies could be developed and then implemented by the COO to improve profitability.

Lonestar Truck Group: As Partner and CFO for this 600 employee, 11 location Freightliner and Western Star dealership, Dan participated at the Partner level to develop strategies and direction for the organization from a management, departmental, and operational standpoint. He helped create and enable Lonestar's vision, strategy, and effective resource alignment that measured performance and accountability across the company and its various locations. At its inception, Lonestar combined two dealership groups and acquired Albuquerque Freightliner. Dan managed the financial transition and the implementation of a new dealer management system, Procede, from three different dealership management systems. Lonestar had the opportunity to purchase 10 truck dealerships from Barloworld. Developed offer price with partners and created pro forma cash flow statement. He worked with attorneys regarding document revisions, and financial institutions for funding. Successful acquisition that gave birth to TAG Truck Centers and Truck Centers of Arkansas.

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