Jared Pickens, Ed.D.
Assistant Prof Track
Management & Economics Department
College of Business
Jared.Pickens@tamuc.edu

Academic Background

Academic Degrees

Ed.D. Texas A&M University - Commerce, Commerece, Texas, Higher Education Leadership, 2015.
Title: *Selecting Successful Financial Counselors*

Other Texas A&M University - Commerce, Commerce, Texas, 18 Hours in AACSB Finance Coursework, 2014.

M.S. Kansas State University, Manhattan, Kansas, Personal Financial Planning, 2010.
Title: *THESIS: Created ECO 233 curriculum and implemented and taught as TAMUC.*

B.S. Texas Tech Uniiversity, Lubbock, Texas, Personal Financial Planning, 2006.
Title: *N/A*

Professional Certifications

General Life and Health Insurance License, 2011, Austin, TX.

CFP, 2009, Washington, DC.

Series 6 - FINRA Registered Representative License, 2009, Dallas, Texas.

Series 63 - State Securities License, 2009, Austin, TX.

AFC - Accredited Financial Counselor, 2008, Westerville, OH.

CRC - Certified Retirement Counselor, 2008, Barrington, IL.

General Lines Property and Casualty Insurance License, 2005, Austin, TX.

Other Credentials & Relevant Courses Taken

Relevant Courses

18 Hours in Finance from an AACSB University - This number of hours meets the SACS and AACSB qualifications required to teach any undergraduate or graduate finance course offered by the College of Business at Texas A&M University - Commerce.

Courses found on Academic Transcript at Texas A&M University - Commerce:

- Corporate Finance
- Advanced Corporate Finance
- Investment Management
- Special Topics in Finance
- Financial Planning
- Risk Management in Financial Planning

Note: 12 hours were included as concentration courses for my terminal degree; Ed.D. in Higher Education Leadership.

Work Experience

Work Experience

Assistant Professor / Director of Personal Financial Planning, Texas A&M University - Commerce (September, 2015 - Present), Commerce, Texas. Teach classees in corporate finance

Teach all classes in CFP(R) registered minor
Register/Direct Personal Financial Planning minor
Honors College Counsel
Teaching and Learning Committee
University Hearing Board
Economics/Finance Society - Academic Advisor

Senior Lecturer / Assistant Clinical Professor / Director of Undergraduate Finance Programs, The University of Texas at Dallas (January, 2012 - August, 2015), Richardson, Texas. · Received the Naveen Jindal Outstanding Undergraduate Teaching Award for effective teaching practices.

· Effectively taught undergraduate courses in Introduction to Financial Planning (FIN 3330), Business Finance (3320), Risk and Insurance (3370), Retirement and Employee Benefits (FIN 4335).

· Effectively taught graduate courses (live and online) in Personal Financial Planning (FIN 6300).

· Managed classroom attention for multiple and diverse students including classroom sizes in excess of 90 students, domestic and international populations, traditional and non-traditional students, finance and non-finance majors.

· Led Texas' second largest undergraduate finance program with more than 700 students; ranked in the nation's top 50 finance programs by Bloomberg's BusinessWeek.

· Responsible for AACSB and SACS assessment; created and exceeded program objectives.

· Coached, trained, and accompanied students in national and global competitions in finance.

· Responsible for curriculum design, implementation, and adjustments for five financial tracks, including Personal Financial Planning, Corporate Finance, Investment Analyst, Real Estate, and Financial Information Management.

· Raised over $90,000 in grant funding to start financial literacy program. Hired student coordinator and 10 interns/volunteers; trained all individuals.

· Provided direction for program that reached over 1,000 UT Dallas students in its inaugural year.

Adjunct Professor, Texas A&M University - Commerce (September, 2009 - January, 2011), Commerce, Texas.

- Served as an adjunct faculty member.
- Taught course financial planning and corporate finance.

Financial Counselor and Consultant for Military, U.S. Department of Defense (January, 2008 - August, 2010), Plano, Virtual. Traveled across the United States to help prepare members of the military prepare for deployment. Helped arrange financial affairs including life insurance, tax review, and counseled regarding estate planning documents.

Investment Advisor and Financial Consultant, Texas Deferred Compensation - Texa$saver (August, 2008 - December, 2010), Austin, Texas. Traveled across the State of Texas and provided presentations regarding investments and retirement planning. Helped individual state employees with investment selection and financial projections.

Financial Planning Director, Lifeway Financial Corporation (January, 2007 - July, 2009), Plano, Texas.

- Helped manage relationships for 45 high net worth clients. Clients' net worth range: $2 MM - $10 MM.
- Provided financial planning education and recommendations for retirement planning, estate planning, investment planning, tax planning, financial statement analysis, and othermiscellaneous financial planning needs.
- Responsible for software review and implementation of different software packages to better serve clients and the firm.
- Worked closely with other financial sepcialists to help clients achieve their financial goals.
- Maintained certifications and CE requirements as required by regulation authorities.

Insurance Specialist, Advanced Insurance (January, 2004 - December, 2006), Lubbock, Texas. Provided insurance solutions after thorough risk management reviews or individuals, families, and corporations.

Intellectual Contributions

Intellectual Contributions Grid

Category	BDS	AIS	TLS	Total
Articles in Refereed Journals		5		5
Articles-in-Progress (All)		5		5
Presentations of Non-Refereed Papers		3		3
Other Research, Refereed and Publicly Available		1		1
Other Research, Non-refereed		1		1

Refereed Articles

Applied or Integrative/application Scholarship

Cordell, D. M., & Pickens, J. (2019). Putting the Client First in Succession Planning. *Journal of Financial Planning, 32 (5)*, 32-34.

Cordell, D., Lauderdale, M., & Pickens, J. (in press, 2019). Financial Planning Insights from Research: Concepts Practitioners Can Use. *Journal of Financial Services Research*.

Cordell, D., & Pickens, J. (in press, 2019). Rising above the Minimum: Create Your CE Plan Now. *Journal of Financial Planning*.

Humphreys, J., Novicevic, M., Hyaek, M., Pane, S., & Pickens, J. (in press, 2018). The Narrative Cleansing of Andrew Carnegie: Entrepreneurial Generativity as Identity Capital. *Journal of Management History*.

Dean, L., Harness, N., & Pickens, J. (in press, 2018). The Upside of a Downturn: Examining Asset Flows and Advisor Compensation After an Economic Downturn. *Journal of Financial Planning*.

Papers Under Review

Pickens, J. & Travis, J. (2018). "Identifying Peer Financial Counselors for Colleges and Universities," 1st revise and resubmit to *Higher Education Policy*.

Presentations of Non-Refereed Papers

National

Pickens, J. (2013-2014). *Financial Literacy Programs in Higher Education.* Invited presentation at Texas Tech Personal Financial Planning Research Forum, Lubbock, Texas.

Harness, N. & Pickens, J. (2016-2017, February). *Social Media, Marketing, Fundraising CFP Registered Programs.* Invited presentation at Texas Tech Personal Financial Planning Research Forum, Lubbock, Texas.

State

Pickens, J. (2014-2015). *Best Practices in Financial Education Programs.* Invited presentation at Texas Association of Collegiate Financial Education Professionals, College Station, Texas, Texas.

Grants

Service

2016-2017: Pickens, J. TD Ameritrade Institutional NextGen Scholarship and Grant Programs, Principal Investigator, TD Ameritrade Institutional. The detailed application sought funds for the expedited growth of the financial planning minor. This included funds for students to travel to conferences, adjunct teaching assistance, and the ability to hire student works.

2014-2015 [Year 2 of 2]: Pickens, J. State Farm Financial Literacy Grant, Principal Investigator, State Farm Foundation.

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2014-2015: Pickens, J. State Farm Financial Literacy Grant, Principal Investigator, State Farm Foundation.

- Contacted State Farm to seek funds to start a financial literacy center.

- Completed proposal and funding request
- Received funds and created and managed new financial literacy center.

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Other Research

2015-2016: Pickens, J., & Travis, J., *Selecting Successful Peer Financial Education Counselors.*
• Doctoral dissertation completed for Ed.D. Mixed method research using the Delphi Method and consisted of 4 data collection rounds. Statistical measures influded f Tests to identify limited change in selections from particiapants.

• Collected primary data from financial literacy program directors to help identify the characteristics needed in a succesful peer financial counselor. The data collected also provided important interview questions to ask when interviewing a candidate, and what other artifacts should be used as part of the selection process.

• The dissertation has been used as a tool across universities when selecting student counselors. The research produced many speaking oportunities to help universities better select students.

• This thesis is published in the ProQuest Database

2015-2016: Maxwell, K., & Pickens, J., *Economic Socialization through Children's Literature.* · This was a thesis titled Economic Socialization through Children's Literature (Honors Thesis with Book)

· This research looked at the transfer of financial education via a children's education book. The book was created and then read by teachers in numerous classrooms and then observations were made regarding whether or not the book provided an increase in very simple financial knowledge like saving, budgeting, and planning.

· This thesis paper is published in the Northeast Texas Publications database.

Working Papers

Dean, L., Pickens, J., Chatterjee, S., & Harness, N. (2018). "Do High Net Worth Clients Avoid RIA Firms with More Agency Costs," targeted for Journal of Financial Planning.

Pickens, J. & Travis, J. (2018). "The Delphi Method's Progress and Use in Academic Research," targeted for Journal of Higher Education Theory and Practice.

Pickens, J. (2018). "Defining Financial Infidelity," targeted for Journal of Financial Counseling and Planning.

Pickens, J. (2018). "CFP Ethical Violations in Various Economical Environments," targeted for Journal of Financial Planning.

Honors & Awards

Honors/Awards

2017-2018: Outstanding Contribution and Service, The Department of Economics/Finance, College of Businnes - Texas A&M University - Commerce. Awarded for major contributions for the Economics and Finance Departmnet for my mentoring, innovation, and directorship.

2016-2017: Engaged Faculty Award, College of Business, Texas A&M University - Commerce. I was given this award for my engagement outside the classroom with students. This award was based on student recommendations and selected by the Director of Career Devolpment. [Type: Award] [Category: Service-University] [Status: Received]

2015-2016: Outstanding Contribution and Service, The Department of Economics/Finance, College of Businnes - Texas A&M University - Commerce. Awarded for major contributions for the Economics and Finance Departmnet for my mentoring, innovation, and directorship. [Type: Award] [Category: Service-University] [Status: Received]

2013-2014 – 2014-2015: Young Guns Award, DFW Financial Planning Association. I was nominated multple years for the Youn Gun's Award. This award is presented to individuals that make substantial contributions and are also under the age of 35. [Type: Award] [Category: Service-Professional] [Status: Nominated]

2013-2014: Outstanding Undergraduate Professor, Naveen Jindal School of Management - The University of Texas at Dallas. This award is was voted on by tenured and non tenured faculty members. This award is presented professors that showcase excellence in teaching. I was selected out of more than 25 tenured and non tenured faculty.
[Type: Award] [Category: Teaching] [Status: Received]

2013-2014: The Chairman's Award for Service and Contribution, DFW Financial Planning Association. I was nominated and selected for the Chairman's Award by the DFW FPA in 2013. This award is presented to individuals that provide servie and leadership within the financial planning industry. It has been awarded since 2003 and is voted on by the DFW FPA's Board of Directors and approved by the Chairman. [Type: Award] [Category: Service-Professional] [Status: Received]

2012-2013: Young Guns Award, DFW Financial Planning Association. I was nominated multple years for the Youn Gun's Award. This award is presented to individuals that make substantial contributions and are also under the age of 35. [Type: Award] [Category: Service-Professional] [Status: Nominated]

Teaching

Courses Taught

University of Texas at Dallas (2012 - 2015)

- FIN 3320: Business Finance
- FIN 3330: Fundamentals of Financial Planning
- FIN 3100: Professional Development in Finance
- FIN 6300: Financial Planning

Teaching Activities and Efforts toward Continuous Improvement

2018-2019 - Advanced Capital Needs Software - Stress Testing and Monte Carlo Analysis for Retirement Distributions.
• Financial planning programs across the country require students to build a highly advanced retirement software package in Microsoft Excel.

• The existing case/software didn't require students to test for uncertainty in variable returns and volatility in retirement distributions. The investment returns were static each year which is unrealistic in even the safest investment portfolios.

• To provide students with a more realistic set of retirement distribution outcomes, I created an additional component for the case. Students watch the pre-recorded video which teaches them how to create the new formulas and macros in Excel. The new software addition uses random number generation based on portfolio allocations and their historical standard deviation of returns. It provides a more accurate success rate in the distribution stage of an advanced retirement plan.

Innovations in Course Content / Presentation.

2018-2019 - University Course Offering: FIN 100 - Foundations of Money Management.

- Created a 3 hour online course including video instruction, collections of academic resources, quizzes, and a final exam.
- Will be used by the university to assist students lacking sufficient hours to graduate.
- Project assigned by the Associate Provost of the univeristy.

Course (New) - Creation/Delivery: Online.

2018-2019 - FIN 436 Self Teaching Evaluation. Other Teaching Activities.

2018-2019 - FIN 438 - SELF TEACHING ASSESSMENT. Other Teaching Activities.

2018-2019 - Professional Identity Theory and Certified Financial Planner Professionals. (Fall,Spring) · Currently serve as thesis advisor for Ms. Jaslyn Wacker.
· Assisted student in developing a challenging research opportunity.
· Coached student through creation of thesis proposal.
· Ms. Wacker successfully defened her thesis proposal and is currently collecting data.
Thesis / Dissertation Committee - Chair.

2018-2019 - Commonalities in Micro-lending Successes and Failures in India. 1 student. (Spring) • Serve as Ms. Cassie Carnine's thesis advisor. We are in the early stages of preparing her thesis proposal for defense.

• Ms.Carnine's thesis proposal will focus on characteristics and situations where micro lending in third world countries are succesful or fail. Thesis / Dissertation Committee - Chair.

2018-2019 - Fin 100 - Foundations of Money. • The class is intended to help students better prepare in managing their personal finances.

• Selected to develop and teach FIN 100 - Foundations of Money Management.

• This will be a University-wide course that allows students to complete their degrees if they are missing credits to graduate.
Course (New) - Creation/Delivery: Online.

2017-2018 - Cattle Flows Study. 1 student. (Fall,Spring) • Served as committee member with Drs. Frannie Miller and Ray Green to assist Ms. Emilee Peterson's thesis regarding cattle flows and diseases forecasting.

• Provided input on methodology and presentation of data.

• Emilee Peterson successfully defended her thesis and went on to win awards at the university and the State of Texas for thesis.
Thesis / Dissertation Committee - Member.

2017-2018 - Exploring the Impact of Financial Literacy Education on College Students. 1 student. (Fall,Spring) · Served with Dr. Robert Rankin in working with Ms. Lacie Jessup.
· Helped mentor and coach Ms. Jessup through the entire thesis process including her successful defense of her thesis.
Thesis / Dissertation Committee - Co-Chair.

2017-2018 - Instant Gratification Experiment - Does Financial Education Delay Instant Gratification?. 1 student.

- Helped Ms. Wacker identify a research area for her thesis and how to conduct a research proposal.
- Ms. Wacker completed her proposal and will defend the proposal and thesis in Spring 2019.

Thesis / Dissertation Committee - Chair.

2016-2017 - FIN 436 - Retirement Planning and Employee Benefits / FIN 536 Advanced Retirement Planning and Employee Benefits. This course was a redisgn as part of the newly financial planning minor registered with the CFP Board of Standards, Inc. The course included new pre-recorded lectures, learning objectives, and case studies. The course also included student access to MoneyGuidePro professional financial planning software. Graduate students are now required an advanced case study which requires students to present their case to the professor. Course (Existing) - Compensated Redesign.

2015-2016 - FIN 430 - Principles of Financial Planning / FIN 530 - Fundamentals of Financial Planning. This course was redisgn as part of the newly financial planning minor registered with the CFP Board of Standards, Inc. The course included new pre-recorded lectures, learning objectives, and case studies. Course (Existing) - Compensated Redesign.

2015-2016 - FIN 434 - Risk Management, Insurance, and Estate Planning / FIN 534 Advanced Risk Management, Insurance, and Estate Planning. This course was a new offering as part of the newly financial planning minor registered with the CFP Board of Standards, Inc. In order to provide students with a more cost-effective minor in financial planning, this course combined two courses into one course. Course (New) - Creation/Delivery: Online.

2015-2016 - FIN 438 - Cases in Financial Planning / FIN 538 - Advanced Cases in Financial Planning. This course was a redisgn as part of the newly financial planning minor registered with the CFP Board of Standards, Inc. The course included new pre-recorded lectures, learning objectives, and case studies. This course is the final course for the financial planning minor and requires students to deliver their final case in a web-delivered presentation to both professors and financial planning professionals. Course (Existing) - Compensated Redesign.

2015-2016 - Recorded Lecture Database: Time Value of Money Calculations Using the BA II Plus Calculator and Excel. • It was identified through faculty meetings that students needed extra training to master time value of money calculations. Students needed assistance with using the BA II Plus calculator and Excel.

• These recorded lectures showed students not only the mathematical formula, but also showed the students how to solve beginning, intermediate and complex calculations.

• These presentations have been used by other professors in helping students better understand how to solve time value of money calculations. Innovations in Course Content / Presentation.

2015-2016 - Economic Socialization through Children's Literature. 1 student. (Fall) • Served as thesis advisor for Ms. Kate Maxwell. The title of her thesis was Economic Socialization through Children's Literature. Ms. Maxwell's thesis earned "Highest Honors".

• Assisted Ms. Maxwell in transferring items from her thesis paper to a children's book titled How Bucks Won the County Fair.

Thesis / Dissertation Committee - Chair.

2015-2016 - Commodities and Financial Market Relationships. 1 student. (Spring) • Served as thesis committee member with Drs. Alper Gormus and Ray Green to assist Mr. Edosa Obaseki with his thesis regarding financial markets; specifically, commodities. Thesis / Dissertation Committee - Member.

2015-2016 - Program Development - CFP(R) Board of Standards, Inc. • Registered undergraduate minor in financial planning with the CFP(R) Board of Standards, Inc. Course (New) - Creation/Delivery: Online.

2012-2013 - ECO 233 - The Economics of Personal Finance. As a graduate student at Kansas State University, I designed and implemented ECO 233 at Texas A&M University - Commerce. This course was the first financial literacy course offered by the university. This course has evolved to be one of the most popular courses at the university growing from 1 section via online delivery to multiple sections including a face to face offering. This course was also selected as one of the electives by the University Honor's College curriculumn. Course (New) - Creation/Delivery: Online.

2011-2012 - FIN 6300 - Personal Financial Planning (UT Dallas). While a professor and administrator at the University of Texas at Dallas, I identified the need for a personal financial management class for MBA students. The course was created and delivered in an online format. This was also one of the first online classes in the Naveen Jindal School of Management that offered a hybrid delivery of pre-recorded and lecture and live web-delivered lectures. This course maxed out in enrollment every year and quickly became one of the most popular courses in the School of Management. Course (New) - Creation/Delivery: Online.

Service

Texas A&M University - Commerce

Department Assignments

Assurance of Learning - Institutional Service:

2016-2017 – 2018-2019: IE Author - BBA Finance

Faculty Advisor:

2016-2017 – 2017-2018: Trip Advisor - G.A.M.E FORUM

2012-2013: Team Mentor/Coach for NAGDCA Retirement Quiz Bowl Challange

Other Institutional Service Activities:

2015-2016 – 2017-2018: Director of Personal Financial Planning

College Assignments

Faculty Advisor:

2016-2017 – 2018-2019: Economics and Finance Society

Other Institutional Service Activities:

2018-2019: Effective Teaching Presentation - COB

2015-2016 – 2017-2018: Honors College Counsel

Member:

2015-2016 – 2017-2018: Assurance of Learning Committee Member

University Assignments

Committee Member:

2016-2017: Financial Literacy - Ad Hoc Committee

Faculty Advisor:

2017-2018: Research Advisor - Lions Innovation Showcase

Other Institutional Service Activities:

2019-2020: Interim Department Head - College of Innovation and Design

2017-2018: Research Judge - Lion's Innovation Showcase

2016-2017 – 2017-2018: University Hearing Board

State-wide Assignments

Other Institutional Service Activities:

2016-2017 – 2018-2019: Financial Planning Day - Conference

Thesis Assignments

Chair:

2018-2019: Thesis Advisor - Jaryn Wacker

2018-2019: Thesis Co Advisor - Lacie Jessup

2017-2018 – 2018-2019: Thesis Advisor - Jaslyn Wacker

2015-2016: Thesis Advisor - Kate Maxwell

Member:

2017-2018: Thesis Committee Member - Emilee Peterson

2015-2016: Thesis Committee Member - Edosa Obaseki

The University of Texas at Dallas

Department Assignments

Faculty Advisor:

2013-2014 – 2014-2015: Financial Leadership Association

Other Institutional Service Activities:

2013-2014 – 2014-2015: Director of Undergraduate Finance Programs

2011-2012 – 2012-2013: Department Exam Author and Assessment Coordinator

2010-2011 – 2011-2012: Associate Director of Undergraduate Programs

University Assignments

Committee Member:

2013-2014 – 2014-2015: Faculty Senate

Faculty Advisor:

2013-2014 – 2014-2015: Comet Cents Financial Education Program

Unassigned

Department Assignments

Other Institutional Service Activities:

2017-2018: Financial Planning and Career & Education Conference - Texas A&M University, College Station

Service to the Profession

Academic Conference: Moderator / Discussant

2013-2014: Texas Tech University - Opportunity Days Conference, Lubbock, Texas (State). I served as a panelist to share my expertise in building a financial planning program and how to transition from the profession of financial planning to academia. The panel included PhD students, faculty from other universities, and practicing financial planners.

I was provided funding for both travel and time for service.

2013-2014: Emerging Issues for Financial Planners - Financial Planning Conference at Texas A&M University, College Station, College Station, Texas (State).   I served as both an academic and professional expert on a conference panel. The audience included faculty, students, and practicing financial planners. I was paid for travel and time.

Board Member: Advisory Board

2013-2014: Texas Tech University- Personal Financial Planning, Lubbock, Texas (State).   I served the Personal Financial Planning Program at Texas Tech University in providing guidance for their financial planning program. I focused on fundraising and program promotion.

Chair: Committee / Task Force

2017-2018: Financial Leadership Advisory Committee - Texas Higher Education Coordinating Board, Austin, Texas (State).

Reviewer - Article / Manuscript

2018-2019: Journal of Financial Therapy (International).

- Invited by Editor and Associate Editor of the Journal of Financial Therapy to review journal submissions.
- Review peer research submissions for acceptance/rejection in JFP.

Reviewer - Book / Textbook

2015-2016: Textbook Chapter, Dallas, Texas (National). • Reviewed (blind) a chapter of a new introductory personal finance book for publisher.

• Provided feedback including reducing and adding subjects, correcting minor errors related to financial planning concepts.

• Received publisher funds to purchase other books currently on the market.

Invited Lecture

2017-2018: Texas Higher Education Coordinating Board - FLAC, Austin, Texas (State). • Invited to provide expertise regarding financial literacy requirements in higher education as a result of various legislative mandates.

• The research was presented to approximately 30 individuals in Austin, Texas and was streamed on the THECB website. Those in audience included THECB Assistant Deputy Commissioner, presidents of universities, deans of colleges, various faculty members and business professionals,

• The presentation provided substantial impact to the Financial Literacy Advisory Council. Prior to the presentation there was a lack of understanding and confusion about financial literacy requirements in higher education. This information helped the committee understand what requirements currently exist. This allowed the committee to identify a new set of requirements or altering the existing requirements.

2015-2016: Dallas Bar Association, Dallas, Texas (Local). • Invited to speak about financial planning and the importance of collaborating with Certified Financial Planner professionals.

• The audience consisted of new attorneys entering the law profession.

• The audience also included law professors and deans from various law schools.

2014-2015: Fidelity Investments' Management Training Program, Westlake, Texas (State). • Fidelity Investments extended another invitation to speak to their management team regarding the new fiduciary rule implemented by the Department of Labor. Approximately 50 individuals attended the meeting.

• The presentation included a detailed review of the DOL's legal requirements. This helped managers identify areas of concern in how they work and charge clients for financial and investment advice.

2013-2014: Fidelity Investments' Management Training Program, Westlake, Texas (State). • Invited by Fidelity Investments' executives to present at their management training session. The presentation focused on social media, mobile device use, and retention of assets under management.

• Presentation included research showing the younger individuals prefer to complete trades, check portfolio balance, and even open new accounts.

• The research presented that teens and young professionals stick to brands that have a strong social media platform.

Other Professional Service Activities

2015-2016: U.S. News and World Report (National). • Provided expertise in media interview and quoted in article

CITATION:
Williams, G. (2015, June 30). 5 tips for newlyweds merging bank accounts. US News and World Report. Retrieved from http://money.usnews.com/money/personal-finance/articles/2015/06/30/5-tips-for-newlyweds-merging-bank-accounts

2015-2016: Dallas Morning News (Regional). • Provided expertise in media interview and quoted in the Dallas Morning News

CITATION:
Curry, K. (2015, October 11). How to find a financial planner to fit you. Dallas Morning News. Retrieved from http://www.dallasnews.com/business/personal-finance/headlines/20151006-finding-a-financial-planner-to-fit-you.ece

2013-2014: Card Hub Online Financial Website (National). Arnold, L. (2013, April 12). Financial literacy at the state level: Texas. Card Hub. Retrieved from http://www.cardhub.com/edu/financial-literacy-in-texas/

Community Service

Chair of a Committee

2008-2009: Financial Planning Association of Dallas Fort Worth - Career Development Co Chair, I served as a Co-Chair for Career Development for the DFW Financial Planning Association. My responsibilities includedd mentoring recently graduated students entering the profession of financial planning. I also served as the organizer of DFW FPA's Career Day. Career Day facilitated interviews between students from multiple universities and financial planning firms.

Member of a Committee

2018-2019: Financial Planning Association of Dallas Fort Worth - Pro Bono Committee, • Assist low income families with their financial planning needs for no cost.

• Provide financial planning education seminars to students in middle school and high school students.

2010-2011: Financial Planning Association of Dallas Fort Worth - Scholarship Selection Committee, The DFW Financial Planning Association offers scholarships for outstanding students seeking their CFP Certification. I was a member of 4 person committee that selected the students based on their application packet. I worked directly with other business professionals.

2010-2011: Financial Planning Association of Dallas Fort Worth - Pro Bono Committee, • Assist low income families with their financial planning needs for no cost.

• Provide financial planning education seminars to students in middle school and high school students.

Other Community Service Activities

2019-2020: Financial Literacy Fair - Grapevine High School,

- Created financial literacy materials for financial literacy fair.
- Met with individual students about basic financial items.
- Provided students with an online game about identity theft.
- Approximately 50 students met with me individually.

2017-2018: Financial Planning Academy at Texas Tech University, • Served as a volunteer mentor, teacher, and speaker at the Texas Tech Financial Planning Academy. The program is a one week summer camp that provides students with an opportunity to learn about money management, understand how to create a financial plan, create a marketing plan, and present their case project to a group of judges.

• Provided students with assistance in identifying financial issues/opportunities in a case. Taught students how to use calculators, understand loans, compound interest calculations, and long term goal planning.

• Presented to students about basic money management skills.

2012-2013 – 2014-2015: Director - Top Performer Trading Competition,
• The virtual camp was innovative as it built relationships with high school students across the United States for recruitment purposes while also providing financial literacy and investing education.

• Created, implemented, and maintained a virtual investment and personal finance camp for 3 years. Served over 500 high school students across the United States.

• Managed a $30,000 budget and negotiated contracts for stock market simulation software including a specialized trading platform for the university.

• Recruited and taught students the basics of investing and personal finance concepts.

• Program recognized in local and national media and cited as being instrumental in encouraging students to major in a business-related field.

Speech / Presentation at a Community Meeting

2017-2018 – 2018-2019: Financial Literacy Presentations - Freshman Success

2017-2018: Economics Finance Society,

- Participated in financial literacy presentations for high school students.
- Trained students to deliver financial literacy presentations.
- Scheduled presentations and provided transportation for students.

2016-2017: Economics Finance Society,

- Participated in financial literacy presentations for high school students.
- Trained students to deliver financial literacy presentations.
- Scheduled presentations and provided transportation for students.

2015-2016: Economics Finance Society,

- Participated in financial literacy presentations for high school students.
- Trained students to deliver financial literacy presentations.
- Scheduled presentations and provided transportation for students.

Professional Memberships

Texas Association of Collegiate Financial Education Professionals, 3

Financial Planning Association, 10

Personal Professional Development

2018-2019: Institutional Review Board (IRB) Training, Commerce, Texas. · Completed IRB training through CITI program.

2018-2019: Sedona Training, Commerce, Texas. · Completed Sedona training with Dr. Gibson in Summer of 2018

2017-2018: Texas A&M University Commerce - University Assessment Symposium, Commerce, Texas. • Attended half day conference hosted by the IE Department at TAMUC.

• Learned about assessment best practices, program management, student success management, and course mapping for degree programs.

2017-2018: COB AACSB Training/Workshop, Commerce, Texas. Attended and participated in a one day training session regarding AACSB accreditation process and best practices in setting standards and measuring outcomes.

2017-2018: TAMUC University Hearing Board Training, Commerce, Texas. • Completed required training in order to serve on the University Hearing Board. The training included:

- Student Code of Content
- Rules regarding the university legal proceedings
- Consequences for different student violations
- How to review a complaint and serve as a judge in an objective manner.

2017-2018: Texas A&M University - Financial Planning Conference, College Station, Texas. • 3 hours of continuing education for CFP Designation earned at Financial Planning Conference at Texas A&M University, College Station (CPE: 3)

2016-2017: TAMUC University Hearing Board Training, Commerce, Texas. • Completed required training in order to serve on the University Hearing Board. The training included:

- Student Code of Content
- Rules regarding the university legal proceedings
- Consequences for different student violations
- How to review a complaint and serve as a judge in an objective manner.

2015-2016: CFP Program Director's Conference, Washington, District of Columbia. • Attended national program directors conference in Washington, D.C.

• The conference provided educational information for program directors regarding multiple changes and additions for CFP Registered Programs.

2009-2010: US Department of Defense Military Benefits Training, Plano, Texas. • Completed 20 hours of training to qualify as a financial counselor for military members deploying and returning from military actions.

• Training focused on medical insurance, life insurance options, Thrift Savings Plan, combat pay, taxation in a combat zone, housing pay, and specific laws protecting service members.

Last updated by member on 03-Sep-19 (08:29 AM)