1. College of Human Ecology (approved by college on April 23, 2013):

   New Bachelor of Science in Personal Financial Planning
   Pages 1-111
a. Summary of Proposed Academic Program (1-15-04)
b. Curriculum Outline for Proposed Academic Program
c. Fiscal Summary for Proposed Academic Program (2-15-01)

New Degree Request – Kansas State University

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Program Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Program Identification CIP</td>
<td>52.0804</td>
</tr>
<tr>
<td>2. Academic Unit</td>
<td>College of Human Ecology, School of Family Studies &amp; Human Services</td>
</tr>
<tr>
<td>3. Program Description</td>
<td>Currently, Personal Financial Planning is a sub-plan within the Family Studies and Human Services degree. The proposal is for a stand-alone major in Personal Financial Planning to meet the professional demands of solidifying Personal Financial Planning as an independent and growing program.</td>
</tr>
<tr>
<td>4. Demand/Need for the Program</td>
<td>There are currently more internship and job opportunities available for undergraduate students than we have graduating students. With the aging population and growing demand for financial planners, this issue is not likely to soon disappear.</td>
</tr>
<tr>
<td>5. Comparative/Locational Advantage</td>
<td>A 2011 Financial Planning magazine article ranked Kansas State University’s Personal Financial Planning program as a top 10 financial planning program. In 2012, Financial Planning once again ranked Kansas State University’s Personal Financial Planning program as one of the 25 great schools for future financial planners. Kansas State University’s Personal Financial Planning program is the only program whose students have been selected as finalists for the national Ameriprise/Financial Planning Association financial planning competition in which we have won 5 of the 11 competitions; more than any other school. We maintain our accreditation with the Certified Financial Planning Board of Standards and a memorandum of understanding with the Association for Financial Counseling and Planning Education so that our students may sit for the rigorous exams of both associations.</td>
</tr>
</tbody>
</table>


6. **Curriculum**
The primary program academic objectives are to provide students with the opportunity to: Solve real world problems; Apply their creativity in helping others meet challenges; Develop and refine communication skills; Work in multidisciplinary and diverse teams; Obtain an understanding of 21st century technologies; Learn through instruction by faculty committed to both teaching and research; Participate in professional groups and activities; Assume leadership positions in school and professionally; Understand and conduct scholarly research in personal financial planning; Be part of a growing program that is devoted to building the finest personal finance (financial planning) program in the nation while meeting the growing need for well-trained graduates.

Other academic program objectives include: Providing courses that meet the criteria to maintain the program’s registered status with the Certified Financial Planning Board of Standards, Inc. Students will be able to comprehensively integrate financial planning content areas into the development of financial plans and targeted financial planning recommendations that meet specific individual and family need sets; Providing opportunities for students to demonstrate the ability to apply verbal, written, and graphic communication and presentation skills to client presentations; Providing students with opportunities to integrate knowledge about family finance, relationships, and management issues in families that are experiencing financial distress through the development of a comprehensive assessment and plan of action based on possible alternatives; Providing opportunities for students to study abroad; Encouraging students to participate in scholarly research; Encouraging student participation in professional publishing activities; Encouraging students to sit for and pass the national CFP Certification Examination.

Specific courses are outlined on the following pages.

7. **Faculty Profile**
We have four assistant professors (two of which hold the AFC and/or CFP® designation) and two associate professors working with the undergraduate degree program.

8. **Student Profile**
We currently have 34 undergraduate students. With the addition of an independent degree, visibility will increase so our numbers will likely increase immediately.

9. **Academic Support**
Our students take other FSHS courses not taught by personal financial planning faculty. The school director will continue to provide guidance for the program.

10. **Facilities & Equipment**
No additional space requirements, facilities, renovations will be immediately needed. We intend to add computer stations to an existing classroom upon the attainment of sufficient external funding. The college dean and assistant to the dean for fiscal management and operations are aware of our plan.

11. **Program Review, Assessment, Accreditation**
In FY 2019, the College of Human Ecology will go through a formal review process by the Kansas Board of Regents. In the last review of the program as contained with the School of Family Studies and Human Services degree, Personal Financial Planning did not receive any negative reports from the board. An internal review occurs on an annual basis as required by the CFP Board.

12. **Costs, Financing**
Please see attached fiscal summary.
I. Identify the new degree: B.S. Personal Financial Planning

II. Provide courses required for each student in the major:

<table>
<thead>
<tr>
<th>Course Name &amp; Number</th>
<th>Credit Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMM 105 Public Speaking IA</td>
<td>2</td>
</tr>
<tr>
<td>or</td>
<td></td>
</tr>
<tr>
<td>COMM 106 Public Speaking I</td>
<td>3</td>
</tr>
<tr>
<td>ENGL 100 Expository Writing I</td>
<td>3</td>
</tr>
<tr>
<td>ENGL 200 Expository Writing II</td>
<td>3</td>
</tr>
<tr>
<td>ECON 110 Principles of Macroeconomics</td>
<td>3</td>
</tr>
<tr>
<td>PSYCH 110 General Psychology</td>
<td>3</td>
</tr>
<tr>
<td>SOCIO 211 Introduction to Sociology</td>
<td>3</td>
</tr>
<tr>
<td>Humanities</td>
<td>6</td>
</tr>
<tr>
<td>Natural and physical sciences</td>
<td>7</td>
</tr>
<tr>
<td>STAT 350 Business and Economic Statistics I</td>
<td>3</td>
</tr>
<tr>
<td>MATH 100 College Algebra</td>
<td>3</td>
</tr>
<tr>
<td>or</td>
<td></td>
</tr>
<tr>
<td>A college-level calculus course</td>
<td>3</td>
</tr>
<tr>
<td>GNHE 210 Foundations of Human Ecology</td>
<td>1</td>
</tr>
<tr>
<td>FSHS 350 Family Relationships and Gender Roles</td>
<td>3</td>
</tr>
<tr>
<td>or</td>
<td></td>
</tr>
<tr>
<td>GNHE 310 Human Needs</td>
<td>3</td>
</tr>
</tbody>
</table>

Core Courses:

<table>
<thead>
<tr>
<th>Course Name</th>
<th>Credit Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>FSHS 100 Family Financial Planning as a Career</td>
<td>1 (taken twice)</td>
</tr>
<tr>
<td>FSHS 105 Introduction to Personal Financial Planning</td>
<td>3</td>
</tr>
<tr>
<td>FSHS 110 Introduction to Human Development</td>
<td>3</td>
</tr>
<tr>
<td>FSHS 301 The Helping Relationship</td>
<td>3</td>
</tr>
<tr>
<td>FSHS 405 Advanced Personal Financial Planning</td>
<td>3</td>
</tr>
<tr>
<td>FSHS 595 Professional Seminar in Family Financial Planning</td>
<td>3</td>
</tr>
<tr>
<td>FSHS 756 Financial Counseling</td>
<td>3</td>
</tr>
<tr>
<td>FSHS 760 Families, Employment Benefits, and Retirement Planning</td>
<td>3</td>
</tr>
<tr>
<td>FSHS 762 Investing for the Family's Future</td>
<td>3</td>
</tr>
<tr>
<td>FSHS 764 Estate Planning for Families</td>
<td>3</td>
</tr>
<tr>
<td>FSHS 772 Personal Income Taxation</td>
<td>3</td>
</tr>
<tr>
<td>ACCTG 231 Accounting for Business Operations</td>
<td>3</td>
</tr>
<tr>
<td>ACCTG 241 Accounting for Investing and Financing</td>
<td>3</td>
</tr>
<tr>
<td>ECON 120 Principles of Microeconomics</td>
<td>3</td>
</tr>
<tr>
<td>ECON 530 Money and Banking</td>
<td>3</td>
</tr>
<tr>
<td>FINAN 460 Insurance</td>
<td>3</td>
</tr>
<tr>
<td>or</td>
<td></td>
</tr>
<tr>
<td>FSHS 766 Insurance Planning for Families</td>
<td>3</td>
</tr>
<tr>
<td>MANGT 390 Business Law I</td>
<td>3</td>
</tr>
<tr>
<td>MKTG 400 Introduction to Marketing</td>
<td>3</td>
</tr>
<tr>
<td>AGEC 513 Agricultural Finance</td>
<td>3</td>
</tr>
<tr>
<td>or</td>
<td></td>
</tr>
<tr>
<td>FINAN 450 Principles of Finance</td>
<td>3</td>
</tr>
</tbody>
</table>

Electives: varies by student 23-24

Research: none required

Practica: none required Total:120
### Fiscal Summary for Proposed Academic Programs

**Institution:** Kansas State University  
**Proposed Program:** Personal Financial Planning, B.S.

#### Part I. Anticipated Enrollment

<table>
<thead>
<tr>
<th></th>
<th>Implementation Year</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full-Time</td>
<td>Part-Time</td>
<td>Full-Time</td>
</tr>
<tr>
<td>A. Full-time, Part-time Headcount:</td>
<td>40 B.S.</td>
<td>2 B.S.</td>
<td>50 B.S.</td>
</tr>
<tr>
<td>B. Total SCH taken by all students in program</td>
<td>1,244</td>
<td>1,536</td>
<td>1,860</td>
</tr>
</tbody>
</table>

#### Part II. Program Cost Projection

A. In implementation year one, list all identifiable General Use costs to the academic unit(s) and how they will be funded. In subsequent years, please include only the additional amount budgeted.

<table>
<thead>
<tr>
<th>Costs:</th>
<th>Fall, Implementation Year</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>$493,000</td>
<td>$502,000</td>
<td>$625,000</td>
</tr>
<tr>
<td>OOE</td>
<td>$25,000</td>
<td>$25,000</td>
<td>$25,000</td>
</tr>
<tr>
<td>Total</td>
<td>$518,000</td>
<td>$527,000</td>
<td>$650,000</td>
</tr>
</tbody>
</table>

* Please note that program cost projection reflects costs for both B.S. and M.S. programs.

Indicate source and amount of funds if other than internal reallocation:
All salaries and OOE have been and will continue to be supported through student tuition dollars. The program is self-sustaining without the need for reallocation from other units.

Revised: September 2003

Approved: ______________
NEW PROGRAM PROPOSAL
for B.S. in Personal Financial Planning

Basic Program Information

1. Proposing Institution
   a. Kansas State University
2. Title of Proposed Program
   a. Personal Financial Planning
3. Degree to be Offered
   a. B.S.
4. Anticipated Date of Implementation
   a. Spring 2014
5. Responsible Units
   a. College of Human Ecology
6. Center for Education Statistics, Classification of Instruction Program (CIP) Code
   a. 52.0804 Financial Planning and Services

PROGRAM PROPOSAL NARRATIVE

a. Program Need and Student Characteristics

Personal Financial Planning is a growing field. As of December 2012, there are 67,323 Certified Financial Planner® certificants¹. With the recent recession, public awareness of financial planning as a field has grown. According to a 2012 survey by the Consumer Federation of America and Certified Financial Planner Board of Standards, consumers exhibit greater confidence and money management skills after seeking the help of a financial planner². The demand for financial planners is also noted in the popular press as a top ranking career for new graduates³. As new careers develop, it is important to show that the Personal Financial Planning program has a strong academic grounding to provide the level of education necessary to move into the specified career.

Currently, Personal Financial Planning is a sub-plan within the Family Studies and Human Services degree. The purpose of separating Personal Financial Planning into its own degree program is to meet the professional demands of solidifying Personal Financial Planning as an independent and growing program. It is important for students to communicate to employers that their training is in Personal Financial Planning. As currently structured, students do not receive a degree in Personal Financial Planning, but rather an emphasis in Personal Financial Planning.

¹ http://www.cfp.net/media/profile.asp
(1) Is the Program Central to the Mission of the Institution?

Kansas State University is a comprehensive, research, land-grant institution first serving students and the people of Kansas, and also the nation and the world. Since its founding in 1863, the University has evolved into a modern institution of higher education, committed to quality programs, and responsive to a rapidly changing world and the aspirations of an increasingly diverse society. Together with other major comprehensive universities, Kansas State shares responsibilities for developing human potential, expanding knowledge, enriching cultural expression, and extending its expertise to individuals, business, education, and government. These responsibilities are addressed through an array of undergraduate and graduate degree programs, research and creative activities, and outreach and public service programs. In addition, its land-grant mandate, based on federal and state legislation, establishes a focus to its instructional, research, and extension activities which is unique among the Regents' institutions. Through quality teaching, the University is committed to provide all students with opportunities to develop the knowledge, understanding, and skills characteristic of an educated person. It is also pledged to prepare students for successful employment or advanced studies through a variety of disciplinary and professional degree programs. To meet these intentions, the institution dedicates itself to providing academic and extracurricular learning experiences which promote and value both excellence and cultural diversity. Kansas State University prepares its students to be informed, productive, and responsible citizens who participate actively in advancing cultural, educational, economic, scientific, and socio-political undertakings.

Kansas State University's mission includes enriching the lives of the citizens of Kansas by extending to them opportunities to engage in life-long learning and to benefit from the results of research. The University addresses this charge through mutually supportive activities on its Manhattan, Salina, and Olathe campuses, research and extension sites at numerous locations, outreach programs offered throughout the State and nation, and international activities.

The mission of Kansas State University is enhanced by symbiotic relationships among the discovery of knowledge, the education of undergraduate and graduate students, and improvement in the quality of life through research applications. Coordinated teaching, research, and extension services help develop the highly skilled and educated work force necessary to the economic well-being of Kansas, the nation, and the international community.

Kansas State University has a goal of being a top 50 public research institution by the year 2025. The thematic goals outlined by the 2025 committee and how the Personal Financial Planning program intends to help meet these goals are outlined below:

**Theme 1: Research, Scholarly and Creative Activities, and Discovery**
Create a culture of excellence that results in flourishing, sustainable, and widely recognized research, scholarly and creative activities, and discovery in a variety of disciplines and endeavors that benefit society as a whole.

- The undergraduate students are expected to write a research paper in FSHS 756 Financial Counseling. Undergraduate students write and give an oral presentation of a comprehensive financial plan, which is a crucial job skill. We currently have three
undergraduate students serving as research assistants for faculty members. Students regularly attend conferences, such as the Association for Financial Counseling and Planning Education and the Financial Planning Association annual conferences. Personal Financial Planning faculty have an outstanding record of publications, publishing an average of four publications each per year. The core financial planning faculty publish, on average, 40 total publications per year.

Theme 2: Undergraduate Educational Experience
Build a connected, diverse, empowered, engaged, participatory culture of learning and excellence that promotes undergraduate student success and prepares students for their professional, community, social, and personal lives.

- Undergraduate students remain active in the regional Financial Planning Association chapter in Kansas City and in their own student chapter on campus. They are encouraged to attend national conferences, including the national Financial Planning Association conference and participate in national competitions. An emphasis on undergraduate international experience is in progress. The undergraduate emphasis is consistently cited as a top program by industry experts. Kansas State University is the only school in the nation to send a student competition team to the national financial planning competition every year. The 2012 team won first place and the 2011 team won second place. Students can volunteer as a peer financial counselor with Powercat Financial Counseling where they receive in-depth training on how to be a professional financial counselor.

Theme 3: Graduate Scholarly Experience
Advance a culture of excellence that attracts highly talented, diverse graduate students and produces graduates recognized as outstanding in their respective professions.

- Not applicable for this proposal, although we do encourage our top students to apply for graduate studies.

Theme 4: Engagement, Extension, Outreach, and Service
Be a national leader and model for a re-invented and transformed public research land-grant university integrating research, education, and engagement.

- One of the building blocks of the Personal Financial Planning programs involves incorporating strategies that not only integrate culturally diverse students into U.S. and Kansas culture, but that also incorporate traditional students into those diverse cultures and activities already present at the university. Students studying personal financial planning have the option to become a peer financial counselor for the Powercat Financial Counseling center, which offers free financial education and counseling to Kansas State University students. The Institute of Personal Financial Planning clinic offers community members the opportunity to receive free financial counseling while providing faculty and students with valuable research data.

Theme 5: Faculty and Staff
Foster a work environment that encourages creativity, excellence, and high morale in faculty and staff, responds to changing needs, embraces diversity, values communication and collaboration, and is respectful, trusting, fair, and collegial for all.

- Becoming a standalone degree program will help attract high quality financial planning educators and researchers to Kansas State University. The increased visibility of personal financial planning will also help us reach industry supporters. Our goal is to obtain an endowed professor position from industry within the next five to ten years.

**Theme 6: Facilities and Infrastructure**

Provide facilities and infrastructure that meet our evolving needs at a competitive level with our benchmark institutions and are an asset to recruit and retain quality students, faculty, researchers, and staff.

- Given the nature of the quickly evolving field of financial planning, many recent graduates’ jobs revolve around the ability to effectively and efficiently utilize financial planning software to provide meaningful insight into client situations. Faculty members are engaged in active efforts to obtain external funding to redesign a current classroom into a smart classroom with individual computer stations to provide an interactive learning environment for our students. Without this classroom, students are still able to learn the software outside of the classroom as homework assignments. However, by 2025 we hope to have accomplished our goal of securing external funding for a smart classroom so that students can manipulate financial planning software on their individual computers and the instructor will be provided the opportunity to immediately assess student comprehension.

**(2) What is the Student Demand for the Program?**

The demand for a degree in Personal Financial Planning has been consistently growing. The United States Department of Labor, Bureau of Labor Statistics projects a 32% job growth for financial planners between 2010 and 2020, which is much faster than average for all occupations. All occupations include all occupations in the U.S. economy. Today’s aging population will be the primary driver of growth as baby boomers reach retirement, as well as decreased funds and shortfalls for corporate and state pensions, which will increase demand for financial planners.

The majority of undergraduate students do not find the emphasis in Personal Financial Planning until later in their college career. Many of the students express an interest in the program, but were unable to find the course curriculum under the Family Studies and Human Services emphasis option. Having Personal Financial Planning as an independent degree program will help with visibility around campus. Given the demand for graduates in this area, it is important that students find the program early enough in their college career that they can finish their degrees in a reasonable period of time.

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Enrollment for the past five years has been relatively stable in the bachelor’s degree programs. We anticipate that enrollment will rise with greater visibility with a degree titled Personal Financial Planning.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor’s (juniors and seniors only)</td>
<td>34</td>
<td>28</td>
<td>38</td>
<td>29</td>
<td>28</td>
</tr>
</tbody>
</table>

NOTE: Data current as of 12-10-12

(3) What is the Demand for Graduates of this Program?

There are currently more internship and job opportunities available for undergraduate students than we have graduating students. This is good for our students who are looking for jobs. With the aging population and growing demand for financial planners, this issue is not likely to soon disappear. In 2012, the following employers contacted the personal financial planning faculty members for students to hire. Our graduating students were already employed and therefore we did not have students to offer to these employers:

**Job Opportunities**
- Northwestern Mutual Financial, Kansas City, KC
- Financial Solutions, Overland Park, KS
- KHC Wealth Management, Overland Park, KS
- Financial Benefits, Inc., Wichita, KS
- Proequities Inc., Wichita, KS
- Strategic Financial Concepts, Wichita, KS
- Accredited Investors, Inc., Minneapolis, MN
- Joern, Samaha, & Associates, Minneapolis, MN
- Waddell & Reed, any location

**Internship Opportunities**
- Cambridge Investment Research, Inc., Fairfield, IA
- Fox, Joss, & Yankee, Reston, VA
- USAA, San Antonio, TX

Over the past five years, the number of graduates has remained fairly stable with the exception of the 2009-2010 academic year. In the Fall 2009, a new emphasis in Personal Financial Planning to the Ph.D. in Human Ecology was approved, which temporarily reduced the attention on the bachelor’s degree program. With the addition of new faculty since 2009, all programs are once again in a stable position. With a degree titled Personal Financial Planning we anticipate an increase in the number of students which will help with our ability to place students in the open positions.

<table>
<thead>
<tr>
<th></th>
<th>2011-12</th>
<th>2010-11</th>
<th>2009-10</th>
<th>2008-09</th>
<th>2007-08</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bachelor’s</td>
<td>13</td>
<td>12</td>
<td>9</td>
<td>18</td>
<td>23</td>
</tr>
</tbody>
</table>
(4) What are the Locational and Comparative Advantages of this Program?

The proposed programs offer unique locational and comparative advantages in the relation to similar academic units of study nationally and internationally. The only other university offering a Personal Financial Planning undergraduate degree program in the state of Kansas is Fort Hays State University. Personal Financial Planning courses are now being offered at the Kansas State University Salina campus. We are able to serve the entire eastern part of the state and also attract students from the neighboring states of Nebraska and Missouri who may not be close to another Personal Financial Planning program.

Employer demand for graduates continues to grow. This is based, in part, on the quality of education received by students at Kansas State University. A 2011 Financial Planning magazine article ranked Kansas State University’s Personal Financial Planning program as a top 10 financial planning program. In 2012, Financial Planning once again ranked Kansas State University’s Personal Financial Planning program as one of the 25 great schools for future financial planners. Kansas State University’s Personal Financial Planning program is the only program whose students have been selected as finalists for the national Ameriprise/Financial Planning Association financial planning competition. In 2012, Kansas State University placed first in the national competition. Since inception in 2000, Kansas State University has placed first in the competition a total of five times; more than any other school.

Kansas State University strives to uphold the highest standards for students studying Personal Financial Planning. As such, we maintain our accreditation with the Certified Financial Planning Board of Standards and a memorandum of understanding with the Association for Financial Counseling and Planning Education so that our students may sit for the rigorous exams of both associations.

The Personal Financial Planning program houses the Institute of Personal Financial Planning, which provides education and outreach for the greater Manhattan community as well as conducts multidisciplinary research. Research funded through the Institute has been published in national and international journals. A significant competitive advantage is provided by the multidisciplinary nature of the School of Family Studies and Human Services, which houses the Personal Financial Planning unit. Faculty working in the School support the proposed degree.

(5) What are the Characteristics of the Students Who Will Participate in this Proposed Program?

The students fit the typically demographic characteristics of the Kansas State University undergraduate population. The students attracted to the Personal Financial Planning program are those who want to work with people, yet are proficient in quantitative skills. Students often switch their major from general Family Studies and Human Services or Business to Family Studies and Human Services with an emphasis in Personal Financial Planning because of their desire to help individuals and families with their personal financial situation.

The proposed undergraduate degree program will use the standard admission requirements used by Kansas State University, which state: If you graduated from an accredited high school and meet any one of these three criteria, you will be eligible for admission to K-State:

- Achieve a 21 or higher composite score on the ACT assessment or a 980 or higher on the SAT I, CR + M. Most students take the test in their junior or senior year of high school. Ask your high school counselor for a schedule of test dates.
- Rank in the top third of your graduating class.
- Complete the Kansas precollege curriculum with a 2.0 GPA. Out-of-state residents must earn a 2.5 or higher GPA.

**b. Curriculum of the Proposed Program**

The goals and objectives of the Personal Financial Planning B.S. program are designed to provide talented and ambitious students with the knowledge, skills, and tools necessary to achieve success as practitioners of financial planning and productive citizens of the State of Kansas and the United States. A dedicated commitment to enhancing students’ personal development will prepare students to excel academically and professionally, leading ultimately to more rewarding and creative lives.

The primary program academic objectives are to provide students with the opportunity to:

- Solve real world problems;
- Apply their creativity in helping others meet challenges;
- Develop and refine communication skills;
- Work in multidisciplinary and diverse teams;
- Obtain an understanding of 21st century technologies;
- Learn through instruction by faculty committed to both teaching and research;
- Participate in professional groups and activities;
- Assume leadership positions in school and professionally;
- Understand and conduct scholarly research in personal financial planning;
- Be part of a growing program that is devoted to building the finest personal finance (financial planning) program in the nation while meeting the growing need for well-trained graduates.

Other academic program objectives include:

- Providing courses that meet the criteria to maintain the program’s registered status with the Certified Financial Planning Board of Standards, Inc. Students will be able to comprehensively integrate financial planning content areas into the development of financial plans and targeted financial planning recommendations that meet specific individual and family need sets.
- Providing opportunities for students to demonstrate the ability to apply verbal, written, and graphic communication and presentation skills to client presentations.
- Providing students with opportunities to integrate knowledge about family finance, relationships, and management issues in families that are experiencing financial distress.
through the development of a comprehensive assessment and plan of action based on possible alternatives.

- Providing opportunities for students to study abroad.
- Encouraging students to participate in scholarly research.
- Encouraging student participation in professional publishing activities.
- Encouraging students to sit for and pass the national CFP™ Certification Examination.

The same general admission procedures will be used, as required by the Kansas State University undergraduate catalog, which includes obtaining a minimum ACT or SAT score, high school or transfer college GPA, and/or ranking in graduating high school class.

**Personal Financial Planning (B.S.)**
Once at Kansas State University, admission to the personal financial planning program requires completion of FSHS 105 with a grade of B or better. The proposed separation of Personal Financial Planning as an independent degree will include the same course requirements, including the following.

**Bachelor’s degree requirements**

**Communications (8–9 credit hours)**

- COMM 105 - Public Speaking IA **Credits:** (2)
- or
- COMM 106 - Public Speaking I **Credits:** (3)
- ENGL 100 - Expository Writing I **Credits:** (3)
- ENGL 200 - Expository Writing II **Credits:** (3)

**Social sciences (9 credit hours)**

- ECON 110 - Principles of Macroeconomics **Credits:** (3)
- PSYCH 110 - General Psychology **Credits:** (3)
- SOCIO 211 - Introduction to Sociology **Credits:** (3)

**Humanities (6 credit hours)**

(Only a course of 3 credits or more will apply.)

**Natural and physical sciences (7 credit hours)**

- Life science elective and physical science elective
  (One course must be taken from each area; one course must include a laboratory.)

**Quantitative studies (6 credit hours)**
• STAT 350 - Business and Economic Statistics I Credits: (3)

Choose one from the following:

• MATH 100 - College Algebra Credits: (3)
• A college-level calculus course Credits: (3)

Integrative Human Ecology Course (4 credit hours)

• GNHE 210 - Foundations of Human Ecology Credits: (1)
• FSHS 350 - Family Relationships and Gender Roles Credits: (3)
• or
• GNHE 310 - Human Needs Credits: (3)

(Grades of C or higher required.)

Professional FSHS courses (32 credit hours)

• FSHS 100 - Family Financial Planning as a Career Credits: (1) *Must be taken twice.*
• FSHS 105 - Introduction to Personal and Family Finance Credits: (3)
• FSHS 110 - Introduction to Human Development Credits: (3)
• FSHS 301 - The Helping Relationship Credits: (3)
• FSHS 405 - Advanced Personal and Family Finance Credits: (3)
• FSHS 595 - Professional Seminar in Family Financial Planning Credits: (3)
• FSHS 756 - Financial Counseling Credits: (3)
• FSHS 760 - Families, Employment Benefits, and Retirement Planning Credits: (3)
• FSHS 762 - Investing for the Family's Future Credits: (3)
• FSHS 764 - Estate Planning for Families Credits: (3)
• FSHS 772 - Personal Income Taxation Credits: (3)

Other supporting courses (26 credit hours)

• ACCTG 231 - Accounting for Business Operations Credits: (3)
• ACCTG 241 - Accounting for Investing and Financing Credits: (3)
• AGEC 490 - Computer Applications in Agricultural Economics and Agribusiness Credits: (2)
• ECON 120 - Principles of Microeconomics Credits: (3)
• ECON 530 - Money and Banking Credits: (3)
• FINAN 460 - Insurance Credits: (3)
• or
• FSHS 766 - Insurance Planning for Families Credits: (3)
• MANGT 390 - Business Law I Credits: (3)
• MKTG 400 - Introduction to Marketing Credits: (3)

Choose one from the following:

• AGEC 513 - Agricultural Finance Credits: (3)
- FINAN 450 - Principles of Finance Credits: (3)

Unrestricted electives (21–22 credit hours)

Total hours required for graduation (120)

c. Program Faculty

Quality of Faculty

Regents’ rules require that a unit offering a Ph.D. program or doctoral emphasis be staffed with qualified faculty. Specifically, six faculty are needed to support a bachelor’s and master’s curriculum. The proposed program meets these requirements as shown in the summary table below (note: curriculum vitae are attached in the appendix).

<table>
<thead>
<tr>
<th>Faculty Member</th>
<th>Degree</th>
<th>Certification</th>
<th>10th apt. w/KSU</th>
<th>Time Allocated to program</th>
<th>Biography</th>
</tr>
</thead>
</table>
| Sonya Britt, Assistant Professor | Ph.D. | CFP®, AFC®, CRC | 1.0 | 40% BS | Dr. Sonya Britt, CFP®, AFC, CRC is an Assistant Professor and Program Director of Personal Financial Planning at Kansas State University. She teaches courses in the undergraduate and doctoral degree programs, including advanced personal financial planning, family and consumer economics, advanced research methods, and advanced statistics.

As founding president of the Financial Therapy Association—an international association of practitioners and academicians—Britt enjoys the opportunity to combine her skills in marriage and family therapy (M.S.) with her talents in financial planning (Ph.D.). Britt was recently elected to the board of the American Council on Consumer Interests association.

Britt is known for her groundbreaking
research in physiological assessment of stress in the financial planning and counseling setting. Britt’s other research interests include the theoretical development of money issues within marriage, predictors of money arguments and their influence on relationship satisfaction and divorce, efficacy of financial literacy efforts, and assessment of money beliefs and behaviors in the financial planning and counseling setting. Britt’s research has been quoted in Kiplinger’s (August 2012), InvestmentNews (March 2012 and July 2010), The Wall Street Journal (December 2011), and the New York Times (May 2011) to name a few. Britt attended the Child and Youth Finance International Financial Literacy Summit held in Amsterdam, Netherlands in April 2012 where she shared her experiences and research in financial literacy of young people.

Britt recently published an edited book with Dr. Dottie Durband, *Student Financial Literacy: Campus-Based Program Development* (published by Springer), which leads readers through the process of developing or enhancing financial literacy programs for college students.

Britt serves as an associate editor for the *Journal of Family and Economic Issues* in addition to serving as a regular journal reviewer for at least five other academic journals.

<table>
<thead>
<tr>
<th>Kristy Archuleta, Assistant Professor</th>
<th>Ph.D.</th>
<th>LMFT</th>
<th>1.0</th>
<th>40% BS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Kristy Archuleta is a Licensed Marriage and Family Therapists (LMFT) in the state of Kansas and an Assistant Professor in the Personal Financial Planning program in the School of Family Studies and Human Services at Kansas State University and a Licensed Marriage and Family Therapist in the state of</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Kansas. Dr. Archuleta obtained a B.S. in Family Relations and Child Development from Oklahoma State University, a Master’s Degree and Ph.D. in Marriage and Family Therapy, and a Certificate in Personal Financial Planning from Kansas State University.

Dr. Archuleta’s research interests and therapy work include bridging the fields of financial planning and counseling and Marriage and Family Therapy. She is co-founder and co-director of the Institute of Personal Financial Planning Clinic where she conducts research and practices in the area of financial therapy. She is a co-founding board member of the Financial Therapy Association and currently serves as the treasurer of the board as well as the co-editor of the FTA sponsored peer-reviewed publication, *Journal of Financial Therapy*. Dr. Archuleta co-founded and chaired Women Managing the Farm, a project focused on agriculture and women in Kansas and surrounding states. In this role, she sought and obtained grant funding and oversaw the collaboration of over 25 local, state, and national farm organizations to hold an annual conference each year to educate, train, and support farm women from Kansas, Oklahoma, and neighboring states.

Dr. Archuleta's research interests include dyadic processes influencing financial satisfaction and marital satisfaction, empirical based treatment for couples experiencing financial difficulties, and rural and farm families, theoretical development to understand the connections between finances and couple relationships and how to work with them. She has co-edited a book, Financial Planning and Scales, and co-authored several articles and two book chapters. As
a faculty member, she has served on the College of Human Ecology’s College Assessment Review Committee (CARC) for doctoral programs. In addition, Dr. Archuleta conducts marriage and family therapy in a local private practice.

<table>
<thead>
<tr>
<th>Name</th>
<th>Degree</th>
<th>Percentage</th>
<th>BS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daniel Botz, Assistant Professor</td>
<td>J.D.</td>
<td>1.0</td>
<td>100% BS</td>
</tr>
<tr>
<td>Dr. Coulson, Assistant Professor</td>
<td>Ph.D.</td>
<td>CFP®, AFC</td>
<td>1.0</td>
</tr>
</tbody>
</table>

Daniel Botz is an Assistant Professor of Personal Financial Planning at Kansas State University Salina. He graduated from the University of Kansas School of Law in 1997. Daniel also holds an MBA and a B.S. in Business Administration from the University of Kansas. Professor Botz joined the faculty at K-State in the Fall 2011 and was a Professor at Kansas Wesleyan University for the previous 12 years. He has taught courses in Business Law, Tax Law, Economics, Personal Finance, and general business. Daniel has presented papers at numerous national conferences and is currently the President of the Midwest Academy of Legal Studies in Business. Professor Botz is head of the Personal Financial Program at Kansas State University’s Salina Campus. Professor Botz’s research interests focus on estate planning and taxation.

Dr. Coulson received her B.S. from the University of Missouri-Columbia in 1974 in Vocational Home Economics Education. She spent the next eight years working for utility companies in Arkansas and Missouri providing public relations and public education. She completed her M.S. in Operations Management from the University of Arkansas in 1980 and her Ph.D. in Human Environmental Sciences (Family & Consumer Economics) from the University of Missouri-Columbia in 1988. She completed the requirements for the CFP® certification in 1991. From 1987 until 1996, Dr. Coulson taught at Kansas State University where she initiated the first CFP® registered undergraduate program in Kansas. While
At K-State she was awarded the Conoco Undergraduate Teaching Award. She moved to Chicago in 1995. While in Chicago, Dr. Coulson served as the Director of the Institute for Personal Finance, an educational institution under the auspices of the Association for Financial Counseling and Planning Education. The purpose of the institute was to educate financial and housing counselors. In 2001, Dr. Coulson and her family returned to Kansas. She lives in Emporia, Kansas where she manages L. Ann Coulson, Ph.D., CFP®, L.L.C, a fee-only financial planning practice. She also serves as an adjunct faculty member for Kansas State University where she teaches online graduate level classes in financial planning. She has mentored fifteen cohorts through the CFP® registered certificate program curriculum.

<table>
<thead>
<tr>
<th>Maurice MacDonald, School Director and Professor</th>
<th>Ph.D.</th>
<th>1.0 5% BS</th>
<th>Maurice MacDonald received his Ph.D. in economics, from the University of Michigan. He is Director of Scholarship and Research for the College of Human Ecology. His scholarship in family economics spans from measures of personal and family economic well-being and income adequacy to intergenerational wealth transfer to the economic status of children, college students and the oldest old. MacDonald has received research grants from the U.S. Department of Agriculture, National Institute of Child Health and Development, National Institute of Mental Health, and the National Institute on Aging. His work has also won him several awards for teaching, administration and research. He has published more than 70 articles, chapters, and technical reports. His book, &quot;Food, Stamps and Income Maintenance,&quot; made his mark as a national expert in the area of economics of welfare and food assistance.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cliff Robb, Ph.D.</td>
<td>1.0 40% BS</td>
<td>Dr. Cliff Robb is an Associate Professor</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Degree</td>
<td>Role 1</td>
<td>Role 2</td>
</tr>
<tr>
<td>---------------------------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
</tr>
<tr>
<td>Martin Seay, Assistant Professor</td>
<td>Ph.D.</td>
<td>CRC</td>
<td>1.0</td>
</tr>
</tbody>
</table>

**Number of Graduate Assistants Needed to Serve Program**

No graduate teaching assistants are needed to implement the program. We would like to recruit on-campus graduate assistants in the future and fund them with external grants.

**d. Academic Support**
What are the Academic Support Services for this Program?
All student advising will be provided by staff currently employed by the Institute of Personal Financial Planning and in the Personal Financial Planning unit in the School of Family Studies and Human Services. No additional advising, library, audio-visual, or academic computing resources will be needed. Resources available for the current emphases at the B.S., M.S., and Ph.D. level are adequate.

The Institute currently employs a full-time graduate coordinator whose responsibilities include student recruitment and advising. All anticipated student support materials are currently available in an online format either through the Division of Continuing Education or through the K-State library system.

What New Library Materials and Other Forms of Academic Support will be Needed Beyond Normal Additions?
No additional library or other academic support will be needed in the immediate future. However, given the nature of the quickly evolving field of financial planning skills in technology are needed by graduates of the program. As mentioned above, the Personal Financial Planning faculty members are actively engaged in efforts to obtain external funding to redesign a current classroom into a smart classroom with individual computer stations to provide an interactive learning environment for students.

What New Supporting Staff will be Required Beyond Normal Additions?
No additional supporting staff will be needed.

d. Facilities and Equipment
What are the Anticipated Facilities Requirements?
No additional space requirements, facilities, renovations will be immediately needed. We intend to add computer stations to an existing classroom upon the attainment of sufficient external funding. The college dean and assistant to the dean for fiscal management and operations are aware of our plan.

What New Equipment will be Required Beyond Normal Additions?
No new equipment will be needed.

NOTE:
Quality control is an issue of major importance to the success of this program. The following Personal Financial Planning faculty will have direct day-to-day contact with students through instruction, advising, and committee leadership and membership:

- Sonya Britt
- Kristy Archuleta
- Daniel Botz
- Ann Coulson
- Maurice MacDonald
- Martin Seay
- Cliff Robb
Based on the Board of Regents Program Review Standards, we believe we meet the minimum requirements for number of majors, degrees granted annually, faculty size, and undergraduate ACT scores.

<table>
<thead>
<tr>
<th>Area</th>
<th>Requirement</th>
<th>2012 Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Majors: Undergraduate</td>
<td>25 (JR/SR)</td>
<td>Undergraduate = 34 (JR/SR)</td>
</tr>
<tr>
<td>Number of Degrees Granted Annually:</td>
<td>Bachelor = 10</td>
<td>Bachelor = 13</td>
</tr>
<tr>
<td>Number of Faculty with Terminal Degrees:</td>
<td>Bachelors = 3</td>
<td>Bachelors = 7</td>
</tr>
<tr>
<td>Average ACT Composite Score:</td>
<td>The mean ACT Composite</td>
<td>Current statistics are combined with the general Family Studies</td>
</tr>
<tr>
<td></td>
<td>Score for undergraduate</td>
<td>and Human Services degree</td>
</tr>
<tr>
<td></td>
<td>majors in a degree should</td>
<td>Current statistics are combined with the general Family Studies and Human</td>
</tr>
<tr>
<td></td>
<td>be above the 20th</td>
<td>Services degree</td>
</tr>
<tr>
<td></td>
<td>percentile for the ACT</td>
<td></td>
</tr>
<tr>
<td></td>
<td>institutional distribution.</td>
<td></td>
</tr>
</tbody>
</table>

*f. Program Review*

**What Program Review Process Methods will be used to Review the Program?**

In FY 2019, the College of Human Ecology will go through a formal review process by the Kansas Board of Regents. In the last review of the program as contained with the School of Family Studies and Human Services degree, Personal Financial Planning did not receive any negative reports from the board. Faculty monitor the assessment measures and student learning outcomes on an annual basis during faculty meetings.

**External Evaluation**

The undergraduate program is registered with the Certified Financial Planning Board of Standards, which means an external association is responsible for monitoring our program on an annual basis. More information on the accreditation/registration process is provided below.

**Internal Evaluation**

Undergraduate students complete a pre-test in FSHS 405 (Advanced Personal & Family Finance), regarding knowledge of the fundamentals of the financial planning process and CFP® Code of Ethics. The plan includes having students complete a post-test over the core principles of personal financial planning and ethics in the capstone course (FSHS 595—Seminar in Personal Financial Planning) at the end of the semester.

Active participation in professional development opportunities are important experiences for undergraduate students, Personal Financial Planning graduating seniors in FSHS 595 are polled about their current and previous involvement in program sponsored activities, including conference trips, leadership roles in the student organization, career days, open house, telefund, and other activities.
Indirect measures are employed during faculty meetings held every two weeks. A recurring theme in these meetings is our desire to inspire passion for the profession of financial planning among students. As a faculty we observe student’s needs to help them understand and grasp material as well as to become active in professional development opportunities. As a result of these meeting discussions, we instituted a new math module into FSHS 405 and new evaluation criteria related to basic concepts and time value of money and ethics training and collaborate with the Financial Planning Association of Kansas City to offer educational and networking opportunities for students.

**Student Learning Outcomes**

Undergraduate student learning outcomes are evaluated based in concordance to the University-wide SLO’s of: Knowledge, Critical Thinking, Communication, Diversity, and Integrity. The current SLO’s for the PFP undergraduate program are assessed and measured by determining students’ demonstration of knowledge and understanding of:

1. Understand the fundamentals of the financial planning process.
2. Calculate and interpret the time value of money.
3. Develop a clear, professional understanding of insurance policies and strategies.
4. Understand risk management concepts.
5. Apply tax planning strategies to meet the goals of the client.
7. Develop estate planning strategies for the benefit of clients.
8. Apply knowledge to help others meet challenges.
10. Develop financial plans for clients with a variety of needs.
11. Develop and refine communication skills.
12. Work in multidisciplinary and diverse teams.
13. Participate in professional groups and activities.
14. Learn and demonstrate leadership skills.
15. Demonstrate standards of ethical conduct which adhere to the Code of Ethics and Professional Responsibility developed by the Certified Financial Planner Board of Standards.

**What are the Institution’s Plans Regarding Program Accreditation?**

Currently, the Certified Financial Planner Board of Standards, Inc. (CFP Board) serves as the accreditation/registration body for all college and university financial planning curriculums in the United States. Re-accreditation/registration occurs every three years. The program coordinator/director is responsible for managing the accreditation process. The undergraduate degree program offered at Kansas State University is accredited/registered with the CFP® Board at this time.

To maintain our registration with the CFP Board, we must submit documentation showing how we cover 78 learning objectives covering the financial planning process in our classes. They
review our course syllabi and textbook selections on an annual basis to be sure we are providing up-to-date knowledge to our students.

The Association for Financial Counseling and Planning Education also registers the Personal Financial Planning programs. This registration allows graduates to obtain the Accredited Financial Counselor designation.

At the current time, accreditation costs are minimal (i.e., less than $2,500 per year). Costs associated with achieving and maintaining accreditation will be paid for by the Institute of Personal Financial Planning.
Appendix

1. Fiscal Summary for Proposed Academic Program
2. Faculty Curriculum Vita
Attachment 1

Fiscal Summary for Proposed Academic Program

IMPLEMENTATION YEAR FY 2013

Institution: Kansas State University
Proposed Program: Personal Financial Planning

<table>
<thead>
<tr>
<th>Part I. Anticipated Enrollment</th>
<th>Implementation Year</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full-Time</td>
<td>Part-Time</td>
<td>Full-Time</td>
</tr>
<tr>
<td>A. Full-time, Part-time Headcount:</td>
<td>40 B.S.</td>
<td>2 B.S.</td>
<td>50 B.S.</td>
</tr>
<tr>
<td>B. Total SCH taken by all students in program</td>
<td>1,224 B.S.</td>
<td>1,536 B.S.</td>
<td>1,860 B.S.</td>
</tr>
</tbody>
</table>

**Part II. Program Cost Projection**

A. In implementation year one, list all identifiable General use costs to the academic unit(s) and how they will be funded. In subsequent years, please include only the additional amount budgeted.

<table>
<thead>
<tr>
<th>Costs: Salaries</th>
<th>Fall, Implementation Year</th>
<th>Year 2</th>
<th>Year 3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$493,000</td>
<td>$502,000</td>
<td>$625,000</td>
</tr>
<tr>
<td>OOE</td>
<td>$25,000</td>
<td>$25,000</td>
<td>$25,000</td>
</tr>
<tr>
<td>Total</td>
<td>$518,000</td>
<td>$527,000</td>
<td>$650,000</td>
</tr>
</tbody>
</table>

* Please note that program cost projection reflects costs for both B.S. and M.S. programs.

Indicate source and amount of funds if other than internal reallocation:
All salaries and OOE have been and will continue to be supported through student tuition dollars. The program is self-sustaining without the need for reallocation from other units.

Revised: November 2012

Approved: _____________________
Attachment 2

Faculty Curriculum Vita
Sonya L. Britt

Assistant Professor 317 Justin Hall
Personal Financial Planning Manhattan, KS 66506
School of Family Studies and Human Services (785) 532-3541
Kansas State University sbritt@k-state.edu

EDUCATION

Texas Tech University
   Doctorate of Philosophy (2010)
   Major: Personal Financial Planning
   Minor: Risk Taking
   Accreditation: Registered by the Certified Financial Planner Board of Standards, Inc.

Kansas State University
   Master of Science (2005)
   Major: Marriage and Family Therapy
   Accreditation: Commission on Accreditation of Marriage and Family Therapy Education

   Bachelor of Science (2003)
   Major: Personal Financial Planning
   Minor: Business
   Accreditation: Registered by the Certified Financial Planner Board of Standards, Inc.

ACADEMIC EXPERIENCE

Kansas State University
   • CFP Board Registered Program Director (April 2012 – present)
   • Assistant Professor (March 2010 – present)
   • Instructor (August 2004 – May 2007; August 2009 – March 2010)
   • Academic Advisor (August 2003 – December 2005)

Texas Tech University
   • Red to Black® Assistant Director (August 2008 – August 2009)
   • Graduate Part-Time Instructor (January 2009 – May 2009)
   • Graduate Research Assistant (May 2007 – August 2008)

CLINICAL EXPERIENCE

Lubbock County Juvenile Justice Center, Lubbock, TX (October 2007 – October 2008)
   • Marriage and Family Therapist

   • Marriage and Family Therapist

Clay County Child Care and Head Start, Clay Center, KS (January 2006 – May 2007)
   • Mental Health Coordinator
**TEACHING EXPERIENCE**

**Kansas State University**

- FSHS 105 Introduction to Personal Financial Planning (undergraduate)
  - Fall 2004 (student evaluation of 4.0/5.0)
  - Spring 2005 (student evaluation of 3.9/5.0)
  - Fall 2005 (student evaluation of 4.0/5.0)
  - Spring 2006 (student evaluation of 4.0/5.0)
  - Summer 2006 (student evaluation of 4.5/5.0)
  - Fall 2006 (student evaluation of 4.1/5.0)
  - Spring 2007 (student evaluation data not available)
  - Summer 2010 (student evaluation of 4.4/5.0)
  - Summer 2011 (student evaluation of 4.5/5.0)

- FSHS 400 Family and Consumer Economics (undergraduate)
  - Fall 2009 (student evaluation of 4.1/5.0)
  - Summer 2010 – online (student evaluation of 4.4/5.0)
  - Fall 2010 (student evaluation of 4.6/5.0)
  - Summer 2011 – online (student evaluation of 4.9/5.0)
  - Fall 2011 (student evaluation of 4.5/5.0)
  - Summer 2012 – online (4.8/5.0)
  - Fall 2012 (student evaluation not yet available)

- FSHS 405 Advanced Personal Financial Planning (undergraduate)
  - Spring 2010 (student evaluation of 4.7/5.0)
  - Spring 2011 (student evaluation of 4.3/5.0)
  - Spring 2012 (student evaluation of 4.3/5.0)

- FSHS 760 Families, Employment Benefits, and Retirement Planning (undergraduate)
  - Fall 2006 (student evaluation data not available)
  - Fall 2009 (student evaluation of 4.5/5.0)

- FSHS 825 Family Resource Management (graduate)
  - Summer 2012 (4.9/5.0)

- FSHS 890 Research Methods II (graduate)
  - Spring 2011 – online (student evaluation of 4.3/5.0)
  - Spring 2012 – online (student evaluation of 4.5/5.0)

- FSHS 894 Research Clusters (graduate)
  - Spring 2011 – online (student evaluation of 5.0/5.0)
  - Fall 2011 – online (student evaluation of 4.7/5.0)

- FSHS 906 Statistics II (graduate)
  - Summer 2010 (student evaluation of 4.5/5.0)
  - Summer 2011 (student evaluation of 4.6/5.0)

**Texas Tech University**

- PFP 2330 Financial Counseling I/Financial Problem Solving (undergraduate)
  - Spring 2009 (student evaluation of 4.6/5.0)
DOCTORAL COMMITTEE SERVED TO COMPLETION


DOCTORAL COMMITTEE SERVICE IN PROGRESS

Chair
Danford, Dan: Kansas State University. Personal Financial Planning.
Leitz, Linda: Kansas State University. Personal Financial Planning.
Molloy, Callie: Kansas State University. Personal Financial Planning.
Spann, Scott: Kansas State University. Personal Financial Planning.
Stutz, Kristen: Kansas State University. Personal Financial Planning.
Tibbetts, Racquel: Kansas State University. Personal Financial Planning.
Yook, Miyoung: Kansas State University. Personal Financial Planning.

Co-chair
Bell, Mary: Kansas State University. Personal Financial Planning.
Nelson, Jeffrey: Kansas State University. Personal Financial Planning.

Committee member
Carr, Nicholas: Kansas State University. Personal Financial Planning.
Cupples, Sam: Kansas State University. Personal Financial Planning.
Fernatt, Fredrick: Kansas State University. Personal Financial Planning.
Henegar, Justin: Kansas State University. Personal Financial Planning.
Rodermund, Rob: Kansas State University. Personal Financial Planning.
Schindler, Kurt: Kansas State University. Personal Financial Planning.

Assigned committee member
Melichar, Mark: Kansas State University. Economics.

GRANTS


Grants, Cont.


Books


Book Chapters


**PEER REVIEWED PUBLICATIONS**

**Britt, S. L.** (under review). Introducing stress research into financial counseling, planning, and education. *Journal of Consumer Affairs.*


Klontz, B. T., & **Britt, S. L.** (in press). Tactical asset management or financial trauma: Why the abandonment of buy-and-hold may be a symptom of posttraumatic stress. *Journal of Financial Therapy.*


**PEER REVIEWED PUBLICATIONS, CONT.**


*Won Outstanding Journal Article Award by Association for Financial Counseling and Planning Education in November 2009*


*Selected as an eXtension publication on “Financial Security for All” website*


**PEER REVIEWED PUBLICATIONS, CONT.**


**NON-PEER REVIEWED PUBLICATIONS**

**Britt, S. L.,** & Grable, J. E. (2012). Your office may be a stressor: Understanding how the physical environment affects financial counseling clients. *AFCPE Newsletter, March.* (invited)


**PEER REVIEWED PRESENTATIONS AND POSTERS**

**Britt, S. L., & Klontz, B. T.** (2012, October). Financial planning for psychologists: 10 things every psychologist should know. Paper at *Hawaii Psychological Association* annual conference: Kaneohe, HI.

Klontz, B. T., & **Britt, S. L.** (2012, October). Financial psychology: Helping clients deal with the no. 1 stressors in their lives. Paper at *Hawaii Psychological Association* annual conference: Kaneohe, HA.


- Paper in progress with *Journal of Financial Counseling and Planning*


**Peer Reviewed Presentations and Posters, Cont.**


**PEER REVIEWED PRESENTATIONS AND POSTERS, CONT.**


- Won 1st prize in Human Sciences category


CONFERENCE PROCEEDINGS (NOT LISTED ELSEWHERE)


INVITED PRESENTATIONS

**Britt, S. L.** (2012, November). Stress: Identifying and addressing it in the counseling setting. Research at *Association for Financial Counseling and Planning Education* annual conference: Saint Louis, MO.
- Invited general session speaker
- Paper in progress with *Journal of Consumer Affairs*


INVITED PRESENTATIONS, CONT.


MEDIA QUOTATIONS

Investment Advisor. (November 2012). Stress fracture: How to save your relationship with your client. COVER STORY

Kiplinger’s. (August 2012). Everyone has a money hang-up.


The Wall Street Journal. (December 12, 2011). So, how does money make you feel? Financial therapists try to help people understand why they may be making bad decisions.

American Airlines Federal Credit Union Cents Magazine. (Fall 2011). Financial futures.

KMAN InFocus Morning Show. (October 10, 2011). Perspectives on personal finances.


Fox Business. (May 10, 2011). Are you teaching kids that rich is sexy?
MEDIA QUOTATIONS, CONT.

MSN Money. (May 10, 2011). Do you worship money?

Also cited in taipeitimes.com, yourmentalwealth.com, rssbroadcast.com


Also cited on Topeka Channel 49 ABC News, KJCK radio, Newwise.com, Physorg.com, K-State News Insider, NYCPPL.com, Polaris-website.com, newblaze.com, servicesdebt.info, financialplanningreviews.com, Emporia’s The Gazette

CreditCards.com. (March 21, 2011). Is it Time to Consider Financial Therapy?
Also cited on FoxBusiness.com, NASDAQ.com, finance.yahoo.com, ourbusinessnews.com, and monetarywealth.com

Topeka Channel 49 ABC News. (October 28, 2010). What students need to know about credit before graduating.

CFA Magazine. (September – October 2010). Out of the Sky: How can advisers help clients who struggle with financial windfalls?

USAA. (July 21, 2010). 7 ways to avoid fighting about finances.


K-State Media Relations. (July 2, 2010). Top financial therapists coming to K-State for annual meeting of Financial Therapy Association.
Also cited in Manhattan Free Press.


K-State Media Relations. (February 11, 2010). Expectations determine whether wife outearning husband is marital sore spot, K-State experts say: Suggest conversations couples should have if situation arises.
Also cited on Newswise.com, Thaindian.com, Psychcentral.com, and Jobs.aol.com

**Professional Service**

Ph.D. Coordinating Committee Member (Fall 2012 – present)
- Kansas State University College of Human Ecology

Board Member (Fall 2012 – Fall 2015)
- American Council on Consumer Interests

Invited panelist for a webinar on secondary datasets (Spring 2012)
- American Council on Consumer Interests

Associate Editor (Spring 2011 – present)
- *Journal of Family and Economic Issues*

Nominations Committee Member (Spring 2011 – Fall 2012)
- American Council on Consumer Interests

Student Scholarship Committee Member (Spring 2011, Spring 2012)
- American Council on Consumer Interests

Student Scholarship Committee Member (Spring 2011 – present)
- Kansas State University School of Family Studies and Human Services

President/Past-President (Spring 2010 – Spring 2013)
- Financial Therapy Association

Journal Reviewer (Fall 2009 – present)

Faculty Liaison (Fall 2009 – Spring 2012)
- Kansas State University’s Powercat Financial Counseling

Guide to Personal Success (Fall 2010)
- Mentored two freshmen at Kansas State University

Conference Session Presider (Fall 2009)
- Association for Financial Counseling and Planning Education 2009 annual conference

Luncheon Speaker (Fall 2008)
- Invited to introduce Distinguished Alumna for College of Human Sciences for Texas Tech University luncheon

Conference Paper/Poster Reviewer (Summer 2008 – present)
- Association for Financial Counseling and Planning Education, Financial Therapy Association, American Council on Consumer Interests
PROFESSIONAL SERVICE, CONT.

Book Reviewer (Spring 2008)
- *Facilitating Financial Health: Tools for Financial Planners, Coaches, and Therapists* by Brad Klontz, Rick Kahler, & Ted Klontz

Forum Committee Member (Fall 2007 – Fall 2008)
- Organized national forum held in November 2008 on Financial Therapy

PROFESSIONAL MEMBERSHIPS

Financial Therapy Association (2010 – present)
Financial Planning Association (2008 – present)
American Council on Consumer Interests (2007 – present)
American Association for Marriage and Family Therapists (2003 – 2009)
Alpha Chi Chapter of Phi Upsilon Omicron Honor Society (2002 – 2003)

PROFESSIONAL CERTIFICATIONS

Accredited Financial Counseling
Certified Financial Planner® certificant
Certified Retirement Counselor

OTHER HONORS/AWARDS

Invited to Child and Youth Finance International Financial Literacy Summit in Amsterdam, Netherlands (April 2012)

Biography appeared on Texas Tech University’s Graduate School homepage as featured alum (2011)
Kristy L. Archuleta

Office: (785) 532-1474     316 Justin                   kristy@ksu.edu
Fax: (785) 532-5505  Kansas State University
Manhattan, KS 66506

Education

Doctor of Philosophy in Marriage and Family Therapy
Certificate & Emphasis: Personal Financial Planning
Kansas State University       2008
Dissertation: The Impact of Dyadic Processes and Financial Management Roles on Farm Couples
Co-Major Professors: Anthony P. Jurich and John E. Grable

Master of Science in Marriage and Family Therapy
Kansas State University       2005
Thesis: Farm Wives’ Level of Involvement in the Financial Management of the Farm Operation and Their Perception of Marital Quality
Major Professor: Candyce S. Russell

Bachelor of Science in Family Relations and Child Development
Minor: Business Management
Oklahoma State University     2001

Certification

Licensed Marriage and Family Therapist, State of Kansas Behavioral Science Regulatory Board, 2007-Present

Professional Experience

Assistant Professor and Graduate Faculty Member
School of Family Studies and Human Services
Kansas State University, Manhattan, KS     August 2008 - present

Director and Co-Founder
Institute of Personal Financial Planning Clinic, Manhattan, KS     2009 - present
  • Provide financial therapy to community residents
  • Conduct research related to financial therapy and financial counseling issues and methods
  • Train students to conduct financial therapy and counseling
  • Market clinic’s services and outcomes
  • Recruit research participants
  • Provide presentations to area community groups and professionals
Archuleta

Project/Conference Chair Summer 2004 – Spring 2011
Committee Member Fall 2011-present

Women Managing the Farm, Manhattan, KS
- Co-founded project and annual conference to provide a safe place for women involved in agriculture to gain skills, education, and networking opportunities.
- Responsible for developing, implementing, and facilitating online support group and 10 networking groups for farm women.
- Responsible for grant writing to obtain funds to finance the Women Managing the Farm project for the United States Department of Agriculture Risk Management Agency.
- Facilitate collaboration of 25 partnering farm organizations and service agencies.

Board of Directors, Co-Founder
Financial Therapy Association
Research Liaison January 2010 – November 2011
Treasurer November 2011 - present
- Co-developed and founded a newly formed national organization, provide research updates, and identify needs of practitioners and researchers in the field and ways the association can provide resources and meet needs of its members.

Teaching Experience

Courses Taught:
- FSHS 756: Financial Counseling (Doctoral)/Summer 2011, 2012
- FSHS 888: Research Methods in FSHS I/Fall 2009, 2010-2012
- FSHS 105: Introduction to Personal Family Finance/Fall 2009, 2010-2012;
  Summer 2010-2012
- FSHS 301: The Helping Relationship/Summer 2006-2007

Courses Developed (not previously offered):
- FSHS 756: Financial Counseling/Fall 2010
- FSHS 888: Research Methods in FSHS I – Online/ Fall 2009
- FSHS 704: Money and Relationships/May Intersession, 2006

Advising and Graduate Supervision

Undergraduate Advising
- Personal Financial Planning Advisor, 10-16 advisees per semester, 2009-present.

Chaired Master’s Committees

Master’s Committee Member
• George, J. (in process). Kansas State University. Marriage and Family Therapy.

Doctoral Committee Chair/Co-chaired
• Coffman, B. (in process). Kansas State University. Personal Financial Planning.

Doctoral Committee Member

Research Experience

Research Interest Areas:
• Relational finances; dyadic processes influencing financial satisfaction and relationship satisfaction
• Effectiveness of financial counseling and planning approaches
• Financial management and well-being of rural and farm families
• Mechanisms and aspects financial therapy
Faculty Research Leader
Research Collaboration in Family Studies and Human Services

**Kansas State University**, Manhattan, KS    Spring 2011-present
- Trained team of students in developing an online questionnaire, conducting and transcribing interviews and analyzing qualitative data; supervised student team in writing and presenting a conference paper.
- Supervised team of students in writing and presenting a conference paper and conference poster, using secondary data from Powercat Financial Counseling.

Faculty Research Leader
Solution Focused Financial Counseling

**Kansas State University**, Manhattan, KS    Fall 2009-present
- Mentored a diverse team of Master’s and Doctoral students from marriage and family therapy and personal financial planning programs in developing and implementing a practice manual that integrates Solution Focused Therapy and financial counseling.
- Supervised team in presenting at two conferences.

Research Team Member
Trauma Research, Education, and Consultation at K-State (TRECK) Team.

**Kansas State University**, Manhattan, KS    Fall 2002-2007
- Assisted with the design, development and implementation of a study exploring the impact of trauma on the couple relationship under the direction of Dr. Briana S. Nelson Goff.
- Assisted with developing conference presentations and writing manuscripts for publication.

Graduate Counseling Intern
KSU College of Veterinary Medicine, Manhattan, KS    September 2006 – August 2008
- Assisted in the development and writing of research projects related to pet loss and grief.

Research Group Member
Student Interest Group

**Kansas State University**, Manhattan, KS    Spring 2006 -2008
- Assisted with the design, development, and implementation of a secondary analysis to determine if financial satisfaction or financial stressors predict marital stability.
- Assisted in the writing of a manuscript and development of a conference presentation and publication.

**Refereed Publications**


*Denotes equal contribution of each author.


Grable, J. E., Archuleta, K. L., & Evans, D. A. (2009). Hey buddy, do you have the correct time (Horizon)? *Financial Services Professionals, 63*, 49-56.


**Books and Book Chapters**


**Refereed Professional Proceedings**


**Other Publications**


*Denotes equal contribution of each author.


Manuscripts in Progress or Submitted for Publication


Editorial and Reviewer Activities

Co-Editor, Journal of Financial Therapy, 2010-present
Reviewer, Family & Consumer Sciences Research Journal, 2011-present
Reviewer, Marriage & Family Review, 2010
Reviewer, Family Relations, 2009-present
Reviewer, Journal of Marriage and Family, 2008-present
Conference Paper Reviewer, American Council on Consumer Interests, 2010
Conference Paper Reviewer, National Council on Family Relations
Conference Presentation Reviewer, American Association of Marriage and Family Therapy Annual Conference

Clinical and Supervisory Experience

Financial Therapist

Institute of Personal Financial Planning Clinic, Manhattan, KS  
- Provide clinical assessment related to financial and relationship issues; provide individual, couple and family financial therapy to address presenting concerns related to relationship and behavioral problems in connection with financial issues.

Family Therapist

- Provide clinical assessment; individual, conjoint, family therapy in a private psychotherapy practice. Address presenting problems that include anxiety, depression, self-care, communication, peer relations, marital conflict and enrichment, parenting skills, parent/child conflict, step family issues, adolescent and child issues, trauma recovery, and play therapy.

Supervisor-in-Training

KSU Family Center, Manhattan KS  August 2006 – 2008  
- Completed AAMFT pre-approved supervision fundamentals course.  
- Provided on-going individual supervision to master level students addressing trainee’s use of theory, conceptual, perceptual, ethical, executive, and professional skills, and self-of-the-therapist issues. Supervision is provided in the forms of live, video, or consultation.  
- Provided live supervision one evening a week to master level students addressing trainee’s use of theory, concept, perceptual, ethical executive, and professional skills, and self-of-the-therapist issues.

Family Therapist Intern

KSU Family Center, Manhattan KS  Summer 2003 – August 2008  
- Provided clinical assessment; individual, conjoint, and family therapy. Address presenting problems that include marital enrichment, marital conflict, parenting skills, parent/child conflict, stepfamily issues, adolescent and child issues, divorce recovery, depression, suicidal ideation, communication, trauma recovery anger/conflict management, finances, and play therapy.

Graduate Counseling Intern

KSU College of Veterinary Medical, Manhattan, KS  September 2006 – August 2008  
- Provided clinical assessment; individual, conjoint, family therapy. Address presenting problems that include anxiety, depression, self-care, communication, peer relations, marital conflict and enrichment, parenting skills, parent/child conflict, step family issues, adolescent and child issues, trauma recovery, and play therapy. Assisted in the development and writing of research projects.

Emergency On-Call Therapist

KSU Family Center, Manhattan, KS  January 2003 – Fall 2006  
- Provided emergency consultation therapy for Family Center clients.

Family Therapist Intern

St. Isidore Student Center, Manhattan, KS  January 2004 – January 2005  
- Provided clinical assessment and conjoint therapy. Addressed presenting problems that include
marriage preparation through topics such as family of origin, expectations of relationship and spouse roles, communication, conflict resolution, and finances.

Family Therapist Intern
Families First, Manhattan, KS Summer 2003 - April 2004
- Provided in-home family services with at-risk families. Included work with marital, single-parent, and blended families with children on issues such as child development, parenting skills, life skills, physical, and abuse.

Family Resource Specialist
Kansas Rural Family Helpline, Manhattan, KS November 2002 – August 2005
- Provided confidential, short-term crisis intervention, emotional support, and resource referral for rural families throughout the state. Addressed presenting problems that include marital conflict, depression, farm related stress and suicidal ideation. Advocate for rural populations’ needs, values and lifestyle. Actively located family and financial resources for rural families. Assist in developing effective networking with federal, state, and community organizations.

Group Facilitator
- Co-facilitated marital enrichment group. Topics included “How to Fight Right,” “Expressing Yourself and Learning to Listen,” “Managing Expectations and Balancing the Relationship,” and “Becoming Best Friends.”

Grants


*Denotes role was to act as P.I. but did not have university role of P.I.; Designed, developed, and wrote, and implemented grant project.

International Refereed or Invited Presentations


National Refereed Presentations


Archuleta, K.L. (August 2008). Dyadic processes influencing financial management roles of farm couples. Presentation at the annual conference of the National Association of Rural Mental Health, Burlington, VT.


and Consultation at K-State. Poster presented at the annual conference of the International Society for Traumatic Stress Studies, Chicago, IL.

National Invited Presentations


Archuleta, K. L., & Olsen, C. S. (October 2010). *Women managing the farm*. Invited presentation of the annual director’s meeting of the USDA Risk Management Community and Outreach Assistance Partnership, New Orleans, LA.


Archuleta, K. L. (July 2009). *Clinical methods applied to financial counseling*. Invited presentation at the annual conference of the American Council on Consumer Interests, Milwaukee, WI.

Archuleta, K. L. (September 2007). *Women managing the farm*. Invited presentation for the U.S. Department of Agriculture Risk Management Agency Community Partnership and Assistance Outreach Director’s Meeting, Milwaukee, WI.

Regional, State, and Local Presentations

Archuleta, K. L. (March 2012). *Families and money*. Invited presentation to South Barber Schools, Kiowa, KS.


Archuleta, K. L., & Grable, J. E. (November 2011). *Levels of proficiency in assessment*. Invited presentation to the K-State Office of Assessment Fair, Manhattan, KS.

Kaus, J., Britt, S. L., & Archuleta, K. L. (September 2011). Financial advice. Invited panel member at the K-State Women’s Wednesday Brown Bag Lunch, Manhattan, KS.

Olsen, C., & Archuleta, K. L. (February 2011). Family talk: Making it work. Invited presentation at the annual Women Managing the Farm conference, Wichita, KS.


Archuleta, K. L. (February 2010). Working effectively with client couples to create a financial partnership. Invited presentation to Kansas State University Foundation’s Insurance and Financial Advisors Continuing Education (IFACE) conference, Manhattan, KS.


Archuleta, K. L. (May 2009). Working effectively with client couples to create a financial partnership. Invited presentation to the Kansas City Advanced Planners Conference, Overland Park, KS.


Archuleta, K. L. (April 2009). The magic of saving. Invited presentation for a workshop sponsored by K-State Credit Union, Manhattan, KS.

Archuleta, K. L. (March 2009). Financing your lifestyle. Invited presentation at Driftwood Christian Church, Cherokee, OK.

Archuleta, K. L. (September 2007). Financing your lifestyle. Guest Lecturer in FSSH 105: Introduction to Personal Family Finance. Kansas State University, Manhattan, KS.


Archuleta, K. L. (March 2006). *Financial tools for helping professionals working with families*. Guest Lecture in FSHS 300: The Helping Relationship, Kansas State University, Manhattan, KS.

Archuleta, K. L. (February 2005). *Conflict resolution*. Invited presentation at the Women Managing the Farm Workshop, Dodge City and Logan, KS.

Shoup Olsen, C., & Archuleta, K. L. (February 2005). *Communication*. Invited presentation at Women Managing the Farm Workshop, Lawrence, KS.

Archuleta, K. L., & Britt, S. L. (December 2004). *Making your holiday spending go farther*. Presentations at the Manhattan Housing Authority and Manhattan Emergency Shelter, Manhattan, KS.

Archuleta, K. L. (December 2004). *Making your holiday spending go farther*. Presentation at the Depression and Bi-Polar Support Group, Manhattan, KS.

Maddux, E. M., Archuleta, K. L., McCants, T., & Griffin, C. (August 2004). *Financial tools for professionals working with families*. Workshop presented to helping professionals, hosted by K-State Research and Extension, Olathe, KS; Hays, KS.


Griffin, C., Jost, J., Shoup-Olsen, C., Archuleta, K. L., Koehne, M., & Schwerdtfeger, K. L (March 2004). *Farming with the family*. Workshops presented to farm families funded by the Risk Management Agency, Salina, Colby, Dodge City, and Chanute, KS.


Archuleta, K. L. (June 2003). *Religious effects on adolescence*. Invited presentation at Driftwood Christian Church, Cherokee, OK.


**Public Service/News**

PFP Program featured in “Aug. 7 event to honor personal financial planning program, students, and alumni.” K-State Media Relations Release, July 26, 2012.

Interviewed in “PFP Ph.D. students study, present research in South Korea.” K-State Media Relations Release, June 28, 2012.

Interviewed in “Taxing times: Experts say avoid getting a refund – but if you do, save it or use to pay down debt.” K-State Media Relations Release, March 14, 2012.


Featured in “Faculty, students present research at financial therapy conference.” College of Human Ecology News, October 11, 2011.

Featured in “Making their Mark: Graduate students presenting research at financial therapy conference.” K-State Media Relations Release, August 29, 2011.

Interviewed in “Money conversations to have before moving in together,” by Carla Cicconne, *Glamour*, May 2011.


Interviewed in “Students needed for financial counseling project,” by Jane Marshall, Kansas State University News Services Communications and Marketing, October 15, 2010.


Interviewed on Agriculture Today with Eric Atkinson, Aired on KFRM. January 2010.

Interviewed on Ag Today radio program with Lory Williams, KBUF AM 1030, Garden City, KS, January 19, 2010.

Interviewed in “Meet the parents: How to make a great impression: A few pointers when its time to meet your beloved’s family for the first time” by William Hageman, *Chicago Tribune*, December 13, 2009.


Interviewed and Featured on Marketplace Money, by Sylvia Gross, NPR. Airdate: November 20, 2009
Interviewed and Featured on KC Currents radio program by Sylvia Gross, KCUR Radio, NPR Affiliate, Kansas City. Air times: August 9, 2009 at 5pm and August 10, 2009 at 8pm; On the Morning Edition program, local drop-ins aired August 11, 2009 at 5:30am, 7:30am, 9:30am.


FilLife.com in partnership with The Wall Street Journal.


Quoted in “Having the money talk: Financial communication essential for couples.” In Go! Special to the Lawrence Journal-World, June 29, 2009.

Interviewed in “Honey, I shrunk the account,” Tamar Snyder, The Jewish Week, June 17, 2009.

Featured in “Maximize your potential’ Archuleta tells 10 Burlington graduates,” Yvonne Miller. Alva Review Courier/Newsgram, June 17, 2009

Quoted in “K-State expert says couples should have a talk about money before they tie the knot.” Forbes.com, June 15, 2009.


Interviewed on Mid America Ag Network Hour radio program with John Runyan, Wichita, KS, February 11, 2009.

Interviewed on Ag Today radio program with Lory Williams, KBUF AM 1030, Garden City, KS, February 9, 2009.


Featured in “K-State Opens Financial Therapy Clinic Downtown,” Steven Godlewski, Kansas State Collegian, January 28, 2009.

Quoted in “Ag Conference for Women Scheduled,” Rural Messenger, January 28, 2009.

Quoted in “Ag Women’s Conference Planned for February” in AgNetwork, December 30, 2008.

Quoted in “Kansas Agriculture Conference for Women,” Kansas City infoZine, December 9, 2008.

Quoted in “Ag Conference for Women Set” in Pork, December 8, 2008.

Quoted in “Women’s conference in January,” Manhattan Mercury.

Quoted in “Ag conference for women scheduled early in 2009,” Grass & Grain, December 9, 2008.

Quoted in “Farm, Ranch Management Conference set for Women,” The Emporia Gazette, December 6, 2008.


Quoted in How to lower financial stress. November 18th, 2008.


Interviewed for student television production, Manhattan Matters (October 2008).

Featured in “Kansas State University Trains Financial Planners” (October 12, 2008) in InvestmentNews.
Interviewed on K-State Ag Today television program, Channel 49 (ABC), Topeka, KS, January 9, 2008.
Interviewed on Ag Today radio program with Lory Williams, KBUF AM 1030, Garden City, KS, February 8, 2007.

**International Activities**

Session Chair, Ewha-KSU Colloquium on Financial Planning. (May 2012). Seoul, South Korea.

**National Activities**

- Treasurer, Financial Therapy Association, 2011 - present
- Board of Directors, Financial Therapy Association, 2010-present
- Research Paper Section Chair, Association of Financial Counseling and Planning Education Annual Conference, 2010
- Poster Section Chair, Association of Financial Counseling and Planning Education Annual Conference, 2009
- Conference Planning Committee Member, National Association for Rural Mental Health, 2007
- Reviewer, National Council on Family Relations Conference, 2006

**University/College/School Activities**

- School of Family Studies and Human Services Intersession Courses Committee, 2012
- School of Family Studies and Human Services PFP Tenure-track Assistant Professor Search Committee, 2012
- PFP Representative to FSHS Graduate Handbook Committee, 2011-2012
- PFP Representative to CHE Assessment Review Committee, 2010-present
- PFP Unit Meeting Facilitator, 2009-2012
- School of Family Studies and Human Services PFP Tenure-track Assistant Professor Search Committee, 2010
- School of Family Studies and Human Services PFP Non-tenure-track Assistant Professor Search Committee, 2010
- School of Family Studies and Human Services PFP Instructor Search Committee, 2009
- Future Financial Planners Student Organization Faculty Advisor, 2008-present
- Advisor, National Women’s Fraternity, 2006-2010
- College Liaison, K-State Saves, 2007
- Advisory Committee Member, AgrAbility, Manhattan. KS, Fall 2002 – August 2005
- Secretary, Trauma Research, Education, and Consultation at K-State (TRECK) team, 2003 - 2004
- Secretary/Treasurer, Student-Associate Organization of American Association for Marriage and Family Therapy, 2003 – 2004
Community Activities

- Advisory Council Member, Housing and Credit Counseling, Inc., Manhattan, KS, 2009 – present
- Member, Mom’s Club of Wamego, Wamego, KS, 2007-2011
- Advisor, Chi Omega National Women’s Fraternity, Kappa Alpha Chapter, 2007-2011

Honors and Awards

- Nominee, Dawley-Scholar Award for Faculty Excellence in Student Development, 2012
- Kansas State University Excellence in Assessment, Award given to Personal Financial Planning Program, 2011
- Nominee, K-State Research and Extension Team Award, 2011
- Nominee, Kansas Civil Rights Achievement Award, USDA Natural Resources Conservation Services, 2008
- Robert H. Poresky Assistantship in Family Studies and Human Services, 2007
- Take Charge American Institute Dissertation Proposal Competition, Honorable Mention, 2007
- Phi Upsilon Omicron Candle Fellowship, Kansas State University, 2003
- College of Human Environmental Sciences Senior of Excellence, Oklahoma State University, 2001
- Kappa Omicron Nu Honor Society Medallion of Excellence, Oklahoma State University, 2001
- American FFA Degree, National FFA Convention, Kansas City, MO, 1998

Professional Memberships

- Associate Member of the American Association for Marriage and Family Therapy
  - Associate Member of the Kansas Association for Marriage and Family Therapy
- Member of the Association of Financial Counseling and Planning Education
- Member of the American Council of Consumer Interests
- Member of the National Council on Family Relations
- Member of the National Association for Rural Mental Health
- Member of the Financial Therapy Association
Daniel Botz  
Curriculum Vitae  

1809 Hillcrest Ln.  
Salina, KS  
Home (785) 825-2478  
abotz@cox.net  

Personal Financial Planning  
Kansas State University - Salina  
2310 Centennial Rd.  
Salina, KS 67401  
785-826-2619  
dbotz@k-state.edu

Education

Juris Doctor, May 1997  
University of Kansas, Lawrence, KS 66045  

Master of Business Administration, May 1997  
University of Kansas, Lawrence, KS 66045  

Bachelor of Science in Business, Business Administration, May 1993  
University of Kansas, Lawrence, KS 66045  

Licensure

Licensed to practice law in Federal District court system  
Licensed to practice law in the State of Kansas  

Publications, Reports and Conference Presentations


**Teaching Experience**

2011-present Kansas State University – Salina
   Assistant Professor of Personal Financial Planning

2000 – 2011 Kansas Wesleyan University
   Associate Professor of Business and Accounting

2004-2006 USD 305 Salina Public Schools
   Visiting Scholar for AP Economics course at Salina High School South and Salina High School Central.

2000 Kansas Wesleyan University
   Adjunct Instructor of Business
   Taught Business Law II course
Work Experience

1999-2000 Kansas Wesleyan University
Alumni Director
Scheduled alumni events and interacted with alumni. Conducted numerous estate planning visits as part of Office of Institutional Advancement on gift taxation matters.

Staff Attorney
Handled all manner of client cases from intake through jury trial. Dealt with following types of cases: estate planning, criminal defense, divorce, civil litigation, bankruptcy, and personal injury.

1997-1998 Ridenour & Ridenour
Staff Attorney
Assisted with client cases in following areas: estate planning, farm law, business law, probate, business formation and foreclosure.

Professional Memberships

Current member of:
Academy of Legal Studies in Business (ALSB)
Western Kansas Council on Estate Planning and Giving – past Board Member
Midwest Academy of Legal Studies in Business – Current President
Midwest Business Administration Association

Faculty Committees and Offices

Kansas State Salina:
2025 Strategic Planning Committee, 2012-2013
Arts, Sciences and Business Department Secretary, 2011-2012
Athletics Committee: Developing proposal for bringing intercollegiate athletics to Salina Campus, 2011-2012
Chair, Search Committee for Tenured Economics Faculty position

Kansas Wesleyan:

Presiding Officer of the Faculty
Chair faculty meetings, serve as faculty representative on President’s Cabinet and Board of Trustees.
Division Chair of Social Sciences
Chair of division meetings, serve on Dean’s advisory board (Divisional Council), Chair peer review committees of divisional members and others, involved in hiring, promotion and termination of faculty.
Curriculum Committee
Review curriculum proposals and liberal studies program.

Institutional Research Board
  Review and approve student and faculty research proposals that involve living subjects.

Budget Committee
  Review budget proposals and make recommendations to the President.

Faculty Affairs Committee
  Make proposals for changes to faculty handbook, prepare quarterly faculty report to the Board of Trustees, coordinate fall faculty retreat.

Peer Review Committee
  Discuss and make recommendations for changes to the peer review process.

Judiciary Committee
  Hold hearings on student conduct code violations.

Community Involvement

University United Methodist Church Chancel Choir, 1999-2005, 2008-2010
First United Methodist Church Chancel Choir 2012-present
Assistant Cub Scout Den Leader, Pack 29 2005-2010
Committee Member, Boy Scout Troop 80, 2010-present
Legal Consultant for Salina Gemstars (Gymnastics) Booster Club 2010-present
Taught cost accounting classes for local business in 2011.
Speaker on local radio and in various community groups in the areas of estate planning, business law and the economy.
Vita
October 2012

Name: L. Ann (Tatum) Coulson

Address: 314 Justin Hall
Kansas State University
620-757-3746
lcoulso1@ksu.edu

Education

B.S. University of Missouri–Columbia
1974 Vocational Home Economics Education

M.S. University of Arkansas
1980 Operations Management

Ph.D. University of Missouri–Columbia
1988 Human Environmental Science (Family and Consumer Economics)

Dissertation: A Comparison of Saving Behavior of the Baby Boom Generation with that of a Prior Comparable Age Cohort

Certifications

CERTIFIED FINANCIAL PLANNER™ certificant, 1991 to present

Professional Experience

2011-present Assistant Professor, Kansas State University

2010 Adjunct Faculty, Kansas State University, undergraduate personal financial planning courses

2005-present Member Manager, L. Ann Coulson, Ph.D., CFP®, L.L.C.

2001-2010 Adjunct Faculty, Kansas State University online graduate certificate courses preparing students to sit for the CFP® exam

2000 Adjunct Faculty, College of Business, Northeastern Illinois University
1996-99  Director, Institute for Personal Finance, Association for Financial Counseling and Planning Education

1994-96  Associate Professor, School of Family Studies and Human Services, Kansas State University

1988-94  Assistant Professor, Department of Human Development and Family Studies, Kansas State University

1987-88  Instructor, Department of Human Development and Family Studies, Kansas State University

1983-87  Graduate Teaching Assistant, Department of Family Economics and Management, University of Missouri

1983-87  Graduate Research Assistant, Department of Family Economics and Management, University of Missouri

1981-83  Communications Editor, Arkansas Nuclear One, Arkansas Power and Light Company, Russellville, Arkansas

1980-81  Customer Service Representative, Arkansas Power and Light Company, Blytheville, Arkansas


Honors

Kappa Omicron Nu Award of Excellence in Research, 1992
  Conoco Outstanding Undergraduate Teaching Award, Kansas State University, 1991
  Outstanding Graduate Student, Department of Family Economics and Management, University of Missouri, 1985-86
  Outstanding Graduate Student Teaching Award, College of Home Economics, 1984-85
  Gregory Fellow, 1983-84
  Outstanding Young Career Woman, Blytheville, Arkansas, 1979
Professional Organizations

Association for Financial Counseling and Planning Education
Financial Planning Association

Service

USD253 Instructional Council, 2008-2010
Friends of the Emporia Public Library
  President, 2006-2009
  Vice-President, 2005
  Board of Directors, 2004
USD253 Calendar Committee, 2006
USD253 Strategic Planning Committee, 2004-2005
Lowther Intermediate School Parent-Teacher Organization
  President, 2004-2005
  Vice-President, 2003-2004
Emporia Parent-Teacher Council
  Treasurer, 2009-2010
  President, 2005-2006
  Secretary, 2002-2005
Butcher Children’s School Parent-Teacher Organization
  Treasurer, 2002-2003
Butcher Children’s School Site Council, 2002-2003
St. Andrews Lutheran School Parent-Teacher League
  President, 2000-2001
  Vice-President, 1999-2000
Soroptimist International of the Americas
  President, Manhattan SI, 1990-92
  Chair, South Central Regional United Nations Committee, 1990-92
  Secretary, Manhattan SI, 1989-90
  Vice-President, Manhattan SI, 1994-95
  Manhattan Consumer Credit Counseling Service Advisory Board Member, 1994-95

Grants

$15,645.

Shanteau. Kansas Department of Social and Rehabilitation Services, 1995-96. $100,000.


Other Academic Activities

Kansas State University, Personal Financial Planning Team Advisor, 2012 FPA Financial Planning Challenge Team, 1st place winners, San Antonio, TX
Kansas State University Strategic Planning Committee, 1994-95
Kansas State University Faculty Senate, 1991-94
  Secretary, 1991-93
  Member, Leadership Group, 1991-93
  Member, Academic Affairs Committee, 1993-94
  Member, Joint Subcommittee to Review Academic Dishonesty Policy, 1993
Kansas State University Essential Edge Committee, 1990-91
College of Human Ecology Faculty Council, 1989-91
College of Human Ecology Student Affairs Committee, 1988-90
  Chair, 1989-90
NCR-52, North Central Region Family Economics Committee
  Chair, 1990-91
  Vice-Chair, 1989-90
  Secretary, 1988-89
NC-182, North Central Regional Research Project
  Secretary, 1990-92
Reviewer: ACCI Annual Conferences, 1992-93, 1994
Reviewer: AFCPE Annual Conferences, 1992, 1994
  Ex-Officio Committee Member, Kansas Supreme Court Child Support Guidelines Committee, 1989-90, 1993-94.
Co-principal Investigator: Successful Coping Strategies of Rural Communities. Kansas Agricultural Experiment Station Interdisciplinary Project, 1992-95.
Co-principal investigator: GIS Technology: A New Approach to Modeling

Papers


Presentations


Consulting


Evaluation of the Kansas Department of Aging’s Senior Care Act Projects FY91. (1991)

Balanced Farming and Family Living Program. (1991)
Elizabeth Chapin Burke Professor of Human Ecology
Director, School of Family Studies and Human Services
Kansas State University

ACADEMIC DEGREES
Modesto Junior College A.A. 1967
University of California-Santa Cruz, Economics A.B. 1969
University of Michigan, Economics A.M. 1971.
(Fields: Economic Demography & Econometrics)
Dissertation Title: Income Distribution and Economic Mobility in Taiwan

POSITIONS HELD
2011- College of Human Ecology Director for Scholarship and Research
2010- Chair, GPISEE Inter-institutional M.S. Program in Family and Community Services (with Larry Ganong, U. Missouri).
2009- Coordinator (with K-State Salina Associate Dean David Delker) K-State Salina Undergraduate Degree Programs in Family Studies, and Personal Financial Planning
1995-2009 Chair (until 2008) and Professor, Iowa State University Department of Human Development and Family Studies
2006-09 Member, ISU Department of Economics
1985-94 Chair, Department of Consumer Science School of Family Resources and Consumer Sciences University of Wisconsin-Madison
1983-95 Professor, Department of Consumer Science, U.W.-Madison
1987-88 Visiting Research Associate, School of Social Welfare University of California-Berkeley
1980 Chair, USDA North Central Regional Research Conference on Family Economics Research (NCR-52)
1975-81 Assistant to Associate Professor of Consumer Science, U. W. -Madison
Fall 1974 Visiting Assistant Professor of Economics, U.W.-Madison
1973-75 Project Associate, University of Wisconsin Institute for Research on Poverty
1971 Instructor, Rockefeller Foundation Summer Training Project in Demographic Research, Taiwan Committee on Family Planning, Taichung, R.O.C.
1969-71 Research Assistant, Population Studies Center of the University of Michigan
Maurice MacDonald

HONORS AND AWARDS

2012        Great Idea Award from Great Plains Interactive Distance Education Alliance

2011        Excellence in Program Assessment Award, Kansas State University Office of Assessment : “A Well-Designed Assessment Process that Demonstrates MS & PhD Program Improvement” (with Kristy Archuleta and John Grable)

2009        Friend of Iowa Association of Marriage and Family Therapy

2008        Iowa State University Faculty Professional Development Leave 2008-09

2006        Miller Faculty Fellow, ISU Center for Excellence in Learning and Teaching

2006        Certificate of Appreciation, Iowa State University Extension to Families

2000        Certificate of Achievement, Iowa State University Extension to Families

1995        Who’s Who in America

1987        Faculty Professional Excellence Award, School of Family Resources Alumni Association

1987        Sabbatical Award, University of Wisconsin-Madison

1983        Outstanding Young Man of America (U.S. Jaycees)

1972-73      National Institutes of Health Economic Demography Training Grant

1970-72      Ford Foundation Fellowship in Population Studies

1969-70      U.S. Public Health Service, NIH Training Grant in Population Studies

1969      Honors in Economics and Crown College Honors University of California at Santa Cruz

1967-69      California State Scholar

1966-67      Alpha Gamma Omega National Junior College Honorary Society

1964      Montana Boys’ State (American Legion, Columbus, MT )

PROFESSIONAL EXPERIENCE

Vice President, Pawnee Mental Health Endowment Advisory Board, 2009-

External Examiner, Universiti Putra Malaysia Department of Consumer Science 2006-

Advisory Board, Institute for Social and Behavioral Research, Iowa State University 2005-2008
Maurice MacDonald

Maurice MacDonald, Member, Resource Planning Team for Preservice Professional Training Reform, State of Iowa Office of Special Education Programs, 1998-2000.


Survey Research Management

<table>
<thead>
<tr>
<th>Year</th>
<th>Role Description</th>
<th>Project Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1986-89</td>
<td>Director of Parent Surveys for the Institute for Research on Poverty</td>
<td>Child Support Reform Project</td>
</tr>
<tr>
<td>1985-86</td>
<td>Director of Children, Incomes, and Program Participation Survey for the Wisconsin Office of Child Support Enforcement</td>
<td></td>
</tr>
<tr>
<td>1983-85</td>
<td>Director, Basic Economic Needs Assessment Study for the Wisconsin Department of Health and Social Services</td>
<td></td>
</tr>
</tbody>
</table>

Consultant


Wisconsin Center for Public Representation, on Consumer Information for Health Insurance Reform and Regulation, 1994.


President Reagan’s Task Force on Food Assistance, 1983.

**Maurice MacDonald**  

United States Senate Select Panel for the Promotion of Child Health, 1979-80.

The Urban Institute Project on Women and the Family, Summer 1977.

United States Senate Select Committee on Nutrition and Human Needs, May 1977.

Food Research and Action Center, 1975-1977.


**Research in Progress**

Scheetz, L., Martin, P., MacDonald, M., & Poon, L.W. Age differences in home health care utilization: Findings from the Georgia Centenarian Study. (February 2012) submitted to *The Gerontologist*.


**PUBLICATIONS AND RESEARCH REPORTS**

**Book**


**Articles, Book Chapters, and Book Reviews**


Maurice MacDonald


Maurice MacDonald


MacDonald, M. Martin, P., Margrett, J., & Poon, L.W. 2009. Correspondence of Perceptions about Centenarians’ Mental Health. *Aging & Mental Health* 13(6), 827-837


Maurice MacDonald


Maurice MacDonald


MacDonald, Maurice and Sawhill, Isabel V. Welfare Policy and the Family. Public Policy (Special Issue on Children's and Family Policy), Winter 1978.


3. Technical Reports
Maurice MacDonald
MacDonald, M.  Financial Counseling Clinic Teaching Innovation Final Report to College of Human Sciences Associate Dean for Research and Graduate Education.  September, 2008.


Martin, Peter, MacDonald, Maurice and Rott, Christoph.  Pilot Study Results for “Resources and Adaptation in Centenarians” to National Institute on Aging, NIH.  Iowa State University Gerontology Program.  February 2003.


MacDonald, Maurice. Multiple Benefits and Income Adequacy for Food Stamp Participant and Nonparticipant Households (with Highlights and Executive Summary by the United States Department of Agriculture, Food and Nutrition Service, Office of Analysis and Evaluation), February 1983. Food and Nutrition Service, USDA.


Bishop, John, and MacDonald, Maurice. The Impact of Wage Subsidies on Employment in State and Local Government, in John Bishop (ed.) The Potential of Wage Subsidies (Final
Maurice MacDonald


MacDonald, Maurice. Adjustment of the Poverty Measure Based on Estimates of the Food Stamp Subsidy for States (report prepared for the Assistant Secretary of Education, DHEW, for the Interagency Task Force on Poverty Definitions), August 1975.


PRESENTATIONS
Referred Research
Gerontological Society of America, “Role of Sensory Impairment Influencing Loneliness Among Centenarians: Findings from the Georgia Centenarian Study” (with Robert Hensley, and Peter Martin), Boston, MA November 2011.

Gerontological Society of America, “Resources and Self-Rated Mental Health among Oldest-Old Adults: Findings from the Georgia Centenarian Study” (with Jinmyoung Cho, and Peter Martin), Boston, MA November 2011.

Association for Financial Planning and Counseling Education, “Knowledge and Skills of Financial at Risk Young Adults in Malaysia” (with Mohamad Fazlil Sabri, Jariah Masud, and Christine C. Cook) Denver, CO. November 2010.


Gerontological Society of America, “Cognitive Resilience and Vitality among Centenarians”
Maurice MacDonald


Asian/Oceania Congress on Gerontology and Geriatrics “Resources and Healthy Longevity among Centenarians” (with Peter Martin and Leonard Poon) Beijing, October 2007.

International Gerontological Congress “Engaged Lifestyle, Personality and Mental Status among Centenarians” (with Peter Martin) Prague, June 2007.


Association for Public Policy Analysis and Management, "Asset Eligibility Rules for Food Stamps" (with Martin David) Bethesda, MD October 1991.

Population Association of America, "Family Background, the Life Cycle, and Inter-household Transfers", Toronto, May 1990.

Maurice MacDonald


Invited Research


Maurice MacDonald


College of Family and Consumer Sciences conference on Gambling and the Family “Overview of the CFCS Poll on Gambling and the Family”, October 1996.


Rockford Institute Center on the Family in America Conference, "Liberty, the Family, and Home Production", Rockford, IL, June 1991.


North Central Regional Conference (NCR-52), Family Economic Research with the National Survey of Families and Households", Madison, WI, October 1990.


Rockford Institute Center on the Family in America Conference on Child Care Policy, Chicago, IL, "The Economics of Day Care", April 1989.


Maurice MacDonald

Wisconsin State Data Center Census Analysis Workshop, Madison, "State and Local Data on Poverty and Hunger in America", October 1986.


Wisconsin Department of Health and Social Services, "Random Digit Dialing Procedures and Sampling Results for a Wisconsin Household Survey", February 1986.


Wisconsin Department of Health and Social Services, "Recommendations for AFDC Needs Standards from the Basic Needs Study", November 1984.

Testified about the Effectiveness of Federal Nutrition Programs at the President's Task Force on Food Assistance Hearings, Atlanta, Georgia, November 1983.

Wisconsin State Data Center Conference on Poverty in Wisconsin, "Impacts of Reagan's Budget cuts on Food Stamp Households", November 1983.


Wisconsin Department of Health and Social Services, "Basic Needs in Wisconsin" October 1983.


Maurice MacDonald

Southwest Regional Food Stamp Conference, Lyndon B. Johnson School of Public Affairs, Austin, TX, "Expenditure Effects of the Food Stamp Program", August 1979.


Board of Studies in Economics, University of California at Santa Cruz, "Cash Versus In-kind Transfers", February 1977.

Midwest Regional Food Stamp Outreach Conference, Des Moines, "Methodology for Determining Local Food Stamp Eligible Population Size", February 1976.


Other Presentations

“Vision and Discovery for Family and Consumer Sciences Research and Graduate Education” Univeristy of Georgia College of Family and Consumer Sciences, May 2012

“CFLE Standards for GPIDEA-Passport MS Distance Program Development for Military Family Career Retention” (co-leader with Larry Ganong, University of Missouri) Ft. Leavenworth, KS November 2010

“Discovery and Vision” School of Family Studies and Human Services, Kansas State University, Manhattan, KS  February 2009.

“Vision and Goals for Education and Human Development Colleges”, Montana State University, Bozeman, MT  February 2009.


Maurice MacDonald


College of Family and Consumer Sciences, ISU Fall Convocation, panel member on "ISU Family Policy Research and Development" August 1998.


Central Presbyterian Church Adult Education Class, “Policy Implications of the CFCS Iowa Poll on Gambling and the Family” Des Moines, November 1996.


Participant, Midwest Consortium for Faculty Development in Early Childhood Special Education Conference, University of Minnesota, St. Paul, June 1995.


University of Wisconsin Foundation Bascom Hill Society faculty presenter on "Advancing the Consumer Interest” U.W. Madison, June 1994.


FRCS Alumni Association Annual Meeting and Awards Ceremony, “Family Economics
Maurice MacDonald
Research and Practice for the Next Decade”, May 1987.


Wisconsin County Welfare Directors’ Association, “Eligibility and Use of Food Stamps” Rhinelander, WI, July 1976.

Maurice MacDonald

COURSES TAUGHT
FSHS Graduate Student Orientation Seminar; Family Economics and Public Policy; Advanced Family Policy Analysis; HDFS Graduate Student Orientation Seminar; Family Economics; Graduate Consumer Science Research Methods; Consumer and the Market; Consumer Legislation; Personal Finance; Consumer Research Graduate Seminar; Senior Seminar in Consumer Science; Population and Resources

M.S. THESIS COMMITTEES

Major Professor
Suzan Albert, 1977
Rosanne Schwalbe, 1979
Alice Lippert, 1979
Bonnie Ortiz, 1979
Pam Klopp, 1980
Mary Tlachac, 1981
Sharon Burns, 1982
Sue LeBaron, 1982
Karen Hintz, 1982
Jean Crownhart, 1982
Ann Neviaser, 1984
Yoshiko Yamada, 1982
Donna Yogerst, 1985
Jana Zeidler, 1986
Molly McMahon, 1989
Sonnie Iawagwu, 1989
Shiu-Wan Hung, 1991
Noriyuki Nakano, 1991
Beth Heinrichs, 1993
Yi-Chun Chen, 1994
Yuri Yoshida, 1994
Chin-I Wang, 1995
Kevin Zimmerman 2010

M.S. Committee Member
Joan Kinney, 1978
Susan Meyer, 1978
Genell Scheurell, 1978
Lurilee Wilson, 1982
Joan Schroeder, 1983
Katherine Wolter, 1985
Joyce Larson, 1983
Brenda Cook, 1985
Trinke Jensen, 1986
Laurie Reed, 1988
Geonguk Jeong, 1990
Keikō Tamura, 1992
Jung Lim, 1993
Claudia Roeder, 1993
Ann Samuels, 1996
Wilene Larpenteur, 1998
Danika Kieschnick, 2006
Angela Hartman, 2006
Doug Borkowski, 2006
Douglas Davis, 2007
Jeanna Hennick, 2009
Deani King, 2010
DOCTORAL COMMITTEES (as major professor, in bold)
Robert M. Hutchens (Haveman, Economics) 1976
Kevin Hollenbeck (Haveman, Economics) 1976
Nancy Jean Davis (Sweet, Sociology) 1976
Norma Nager (Bumpass, Sociology) 1978
Judith Cassety (Garfinkel, Social Work) 1978
Jennifer Warlick (Cain, Economics) 1978
Kuanjeng Chen (Winsborough, Sociology) 1979
Helen Jensen (Saupe, Ag. Economics) 1979
Nancy Dunton (Featherman, Sociology) 1979
John Belknap (Saupe, Ag. Economics) 1979
Michael Sobel (Winsborough, Sociology) 1979
Ephraim Frankel (Marshall, University Committee) 1980
Robert Kroll (Stampfl, University Committee) 1980
Vivian Lowe (Bumpass, Sociology) 1980
Paul A. Wilson (Weisbrod, Economics) 1980
Annemette Sorenson (Sweet, Sociology) 1980
Greg Christiansen (Haveman, Economics) 1981
Bruce Klein (Levitan, George Washington University) 1981
Saul Schwartz (Smolensky, Economics) 1981
David Iaquinta (Sweet, Sociology) 1982
Myung Lee (Smolensky, Economics) 1982
Elizabeth Scannell (Petrich, Family and Consumer Education) 1982
Madonna Bowman (Ahrons, Social Work) 1982
Don Oellerich (Garfinkel, Social Work) 1983
Brian Claridge (Hauser, Sociology) 1983
George Jakubson (Chamberlain, Economics) 1983
Lyle Nelson (Smolensky, Economics) 1983
Michael Massagli (Hauser, Sociology) 1983
James Moran (Garfinkel, Social Work) 1984
Deborah Streeter (Saupe, Ag. Economics) 1985
Laurie Boyce (Apps, CAVE) 1985
Mark Kleczewski (Danziger, Social Work) 1986
Frank Goza (Tienda, Rural Sociology) 1986
Kerry Richter (Bumpass, Sociology) 1987
Quintin Sullivan (Garfinkel, Social Work) 1989
Teresa Castro (Bumpass, Sociology) 1990
Paul Hagstrom (Walker/MacDonald, Economics) 1991
Havidan Rodriguez (Sweet, Sociology) 1991
Peter VanderHart (David, Economics) 1991
Wendy Manning (Bumpass, Sociology) 1992
Joan Kinney (Preston, Journalism) 1994
Geyonguk Jeong (Johnson, Child and Family Studies) 1993
Yuri Yoshida (Holden, University Committee) 1994
Julie Hillery (KangPark, Retailing) 1995
Cathy Mayhew (Lempers, HDFS) 1997
Charles Joannides (Joanning, HDFS) 1997
Bronwyn Fees (Lempers, HDFS) 1998
Sylvia Blanchfield (Crase, HDFS) 2000
Kyrk Zinck (Joanning, HDFS) 2000
Maurice MacDonald

Doctoral Committees (continued)

Jeff Buikema (Joanning, HDFS) 2001
Kathleen Adams (Joanning, HDFS) 2001
Jill Sudak-Allison (Joanning, HDFS) 2001
Sun-Kang Koh (MacDonald, HDFS) 2002
Dilek Tinaz (Joanning, HDFS) 2002
Russ McCullough (Hallem, Economics) 2003
Michael McClain (Crase, HDFS) 2004
Robert Nielsen (Garasky, HDFS) 2004
Jane Rose Njue (MacDonald, HDFS) 2005
Jooyong Sohn (Garasky, HDFS) 2005
Brian Korb (MacDonald, FCEDS) 2006
Tony Jung (Wickrama, HDFS) 2006
Danika Kieschnick (Keino, FCEDS) 2008
Mary Kate Harrison (Bosselman, HRIM), 2008
Flora Surjadi (Wickrama, HDFS) 2008
Yemisi Kuku (Garasky, HDFS) 2008
AnTi-Shih (MacDonald, HDFS) 2009
M. Fazli Sabri (MacDonald, Cook, HDFS) 2011—Grad. School Research Excellence Award
Outside Chair for Deepti Pillai (Zurek, Vet. Medicine, Kansas State) 2010
Fred Fernatt (MacDonald, FSHS-Personal Financial Planning) 2011-
Outside Chair for Laushanda Norman, College of Education doctoral supervision
UNIVERSITY SERVICE

Vice-Chair, Kansas State Research and Extension Annual Conference, 2012-
Chair of GPIDEA MS in Family and Community Services Department Chairs, 2012-
Member, Provost Office Task force on Clinical Faculty Appointments, 2011.
Associate Research Deans Council, 2011-
Coordinator (with Larry Ganong, U. Missouri) GPIDEA Curriculum Team
for M.S. in Family and Community Services, 2010-12
Search Committee member for ATID Chair, College of Human Ecology 2010-11
Team Leader, College of Human Ecology Faculty Council for “Branding” CHE 2010-11
Member, Chairs Group for GPIDEA M.S. in Youth Development , 2009-
Member, Steering Committee for Powercat Financial Counseling Center, 2009-
Advisor, K-State Research and Extension Family Development Program Focus Team 2009-
Member, Chairs Group for the Great Plains Interactive Distance Education Alliance, 2004-2009
Director, and Student Club Advisor, ISU Financial Counseling Clinic, 2005-08.
Disability Liaison, HDFS 2004-08.
Advisory Board, Institute for Social and Behavioral Research. 2004-08.
Member, Search Committee for Chair of AEHSM, College of Human Sciences, 2007.
Member, Budget Model Implementation Committee for College of Human Sciences, 2006.
Member, Budget Planning Committee for College of Human Sciences 2005.
ISU Gerontology Program Leader for the Iowa Consortium on Aging Programs Conference
Coordinator, Helen LeBaron Hilton Visiting Professorship (John Krout) for 2004-05.
Member, Committee to Plan Combination of CFCS and Education Colleges, 2004.
Co-Chair, Search Committee for Chair of ELPS, College of Education, 2004.
Member, ISU Department Chairs’ Council 1999-2005 (Chair, 2001-03).
Member, Committee to Evaluate Dean of Education, 2003.
Chair, Committee to Evaluate CFCS Dean, 2001.
Member, ISU Family Theme Year Committee, 2000-2001.
Coordinator, Helen LeBaron Hilton Visiting Professorship (Shirley Zimmerman) for 1998-99.
Chair, Search Committee for Chair of Hotel, Restaurant, and Institution Management, 1997.
Member, Palmer Building Design Committee, 1996.
Member, Chancellor's Committee to Evaluate the Dean of Family Resources, 1995.
Chair, Search Committee for FRCS Assistant Dean, 1994.
Advisory Board on Consumer Economics, Kellog Foundation Initiative
University Review Committee for the Department of Continuing and Vocational
Ad Hoc Service as Acting FRCS Dean 1990-1995.
FRCS Assistant Dean Search Committee 1986-87.
FRCS Alumni Association Faculty Representative, 1986-89.
Reviewer, Undergraduate Education Committee Academic Excellence Awards 1985-87.
University Continuing Education and Outreach Council, 1984-86.
FRCS Dean Search Committee 1984-85.
Faculty Senator 1983-88.
Faculty Senate Committee on Scheduling of Classes, 1981-82.
TENURE AND PROMOTION REVIEWS

Department Chair Review
- Cynthia Fletcher, Professor, HDFS 1996
- Alice Thieman, Associate Professor, HDFS, 1996
- Steve Garasky, Associate Professor, HDFS 1997
- Carla Peterson, Associate Professor, HDFS 1997
- Paula McMurray, Associate Professor, HDFS 1997
- Linda Enders, Associate Professor, HDFS 1997
- Sue Crull, Probationary Review, HDFS 1997
- Chalandra Bryant, Associate Professor, HDFS 2000
- Sue Crull, Associate Professor, HDFS 2001
- Mary Jane Brotherson, Professor, HDFS 2001
- Ronald Werner-Wilson, Associate Professor, HDFS 2002
- Camilo Garcia, Associate Professor, HDFS 2002
- Mark Oleson, Associate Professor, HDFS 2004
- K.A.S. Wickrama, Professor, HDFS 2004
- Mary Yearns, Professor, HDFS 2004
- Steven Garasky, Professor, HDFS 2006
- Kimberly Greder, Associate Professor, HDFS 2006
- Marcia Michaels, Associate Professor, HDFS 2006
- Megan Murphy, Associate Professor HDFS 2007
- Gayle Luze, Associate Professor HDFS 2007
- Carla Peterson Professor 2007
- Craig Gundersen Associate Professor HDFS 2008
- Jane Mertz Garcia  Professor FSHS 2009
- Elaine Johannes Associate Professor FSHS 2010
- Debra Sellers Associate Professor FSHS 2010
- Joyce Baptist Associate Professor FSHS 2011
- Kristy Archuleta Associate Professor FSHS 2012
- Jared Anderson Associate Professor FSHS 2012

Peer Review Committee Chair
- Norleen Ackerman (Consumer Science) 1985
- Nancy Miller (Consumer Science) 1986
- Randy Mullis (Consumer Science) 1987
- Rader Hayes (Consumer Science) 1987
- Robin Douthitt (Consumer Science) 1989
- Ann Hoyt (Consumer Science) 1991
- Robin Douthitt (Consumer Science) 1992
- Jikyeong Kang-Park (Consumer Science) 1993

Peer Review Committee Member for Tenure and Promotion
- Jean Atkinson (Child and Family Studies) 1986
- Joy Dohr (Environment, Textiles, and Design) 1986
- Michael Hunt (Environment, Textiles, and Design) 1986
- Peg Stevenson (Child and Family Studies) 1986
- Lowell Kroloff (Child and Family Studies) 1988
- John Merrill (Environment, Textiles, and Design) 1989
- Rader Hayes (Consumer Science) 1991
- Joan Csete (Nutritional Sciences) 1992
- Karen Holden (Consumer Science) 1992
- Cyrus Ramezani (Consumer Science) 1993
RESEARCH AND DEVELOPMENT FUNDING

International Area Studies Program, Kansas State University
Project: South Asian Project and South Asian Studies Minor
Period: August 2011-June 2013
Amount: $8,000
Coordinator for FSHS (Anindita Das, instructor and curriculum leader)

Student Government Association and Kansas State University Foundation
Project: Powercat Financial Counseling Center
Period: August 2009-February 2012.
Amount: $200,000
FSHS Coordinator (Jodi Kaus, Program Director; Jennifer Rettelle-Thomas Human Ecology Foundation Officer; John Grable, FSHS, Eric Higgins College of Business, and other PFC Steering Committee members).

Division of Continuing Education, Kansas State University
Project: Course Development Grants (Family Therapy Related Courses, and GPIDEA M.S. Courses for Family Financial Planning, and Youth Development)
Period: July 2010-May 2012
Amount: $40,000
Coordinator for Joyce Baptist, Esther Maddux, and Anindita Das

Kansas Department of Social and Rehabilitative Services
Project: Strategic Development for Faith-Based Initiatives (Technical Support and Training Contract)
Period: July 2010 –June 2012
Amount: $940,000
Coordinator (Charles Griffin, FSHS, P.I., Jared Anderson, co-Investigator)

National Institutes of Health, National Institute on Aging
Project: Resources and Adaptation in Centenarians
Period: June 2004-August 2009
Amount: $468,588
Co-Principal Investigator (with Peter Martin)

College of Human Sciences Teaching Innovation Competition
Project: Financial Counseling Clinic Teaching Innovation
Period: July 2007-June 2008
Amount: $13,607
Project Coordinator (with Douglas Borkowski)

Iowa Agriculture and Home Economics Experiment Station
Project: Vulnerability and Resiliency of Old and Very Old Rural Adults
Period: September 2006-August 2011
Amount: $400,000
Co-Investigator with Peter Martin, Dan Russell, K.A.S. Wickrama
Maurice MacDonald

College of Human Sciences Research Initiative
   Project: Gerontology Program and HDFS Iowa Family Survey: Rural Aging
   Period: January 2005-August 2007
   Amount: $40,000
   Coordinator (Sue Crull and Peter Martin co-investigators)

Iowa State University Center for Excellence in Learning & Teaching
   Project: Miller Faculty Fellowship on Evaluating Approaches to Enhance Student Awareness of Consumer Credit Dangers
   Period: July 2006-September 2007
   Amount: $25,000 (with Virginia Blackburn, College of Business)

Iowa State University Government of Student Body
   Project: HDFS Financial Counseling Clinic Services
   Period: July 2006-June 2009
   Amount: $142,000
   Director (with Douglas Borkowski)

Iowa State University Council on International Programs
   Project: Distance Education and Research in Family Resource Management with Universiti Putra Malaysia
   Period: January 2005-July 2006
   Amount: $5,000
   Project Director

College of Family and Consumer Sciences Research and Outreach Initiative
   Project: Center for Family Policy, Iowa Family Survey: Child Care
   Period: August 2004 –December 2006
   Amount: $50,000
   Coordinator (and co-investigator with Susan Hegland and Sue Crull)

U.S. Center for Disease Control
   Project: Geriatric Innovation from the Heartland (collaboration with Methodist and Lutheran Iowa Health System)
   Period: April 2004-December 2004
   Amount: $53,016
   Co-Investigator (with Daniel Russell)

Ames Community School District
   Project: Early Childhood Education Program
   Period: June 2001-July 2004
   Amount: $198,000
   Co-Director with Susan Hegland and Carol Phillips

Iowa Agriculture and Home Economics Experiment Station
   Project: Family and Community Support for Rural Quality of Life
   Period: October 2000-September 20005
   Amount: $1.1M
   Project Leader (and co-investigator with nine HDFS faculty members).
Maurice MacDonald

Ames Community School District
  Project: Early Childhood Education Program
  Period: July 1999-June 2001
  Amount: $133,000
  Co-Director with Joan Herwig

Humanities Iowa Major Grant
  Project: A Celebration of Family Resiliency
  Period: March-June 1999
  Amount: $8,200
  Collaboration with Extension to Families and Brunnier Art Gallery

Ames Community School District
  Project: Early Childhood Education Program
  Period: July 1996-June 1999
  Amount: $157,000
  Co-Director with Joan Herwig

Iowa State University Graduate College Research Grant
  Project: Nationally Consistent State-Level Welfare Reform Survey
  Period: July 1998-June 1999
  Amount: $10,800
  Principal Investigator

ISU Extension to Families Initiative Funds and Experiment Station Support
  Project: Family Wellbeing and Welfare Reform in Iowa
  Period: January 1997-June 1998
  Amount: $150,000
  Coordinator (with Cynthia Fletcher, Mary Winter, Dan Otto, and Jan Flora)

University of Wisconsin-Madison Graduate School
  Project: Financial Transfers from Parents to Adult Children
  Period: Summer 1995
  Amount: $19,000

University of Wisconsin-Madison Graduate School
  Project: Inter-Family Financial Transfers over the Life Course
  Period: June 1, 1994 to May 30, 1995
  Amount: $25,000
  Principal Investigator

Food and Nutrition Service, USDA
  Project: Asset Testing in the Food Stamp Program
  Period: October 1, 1991 to September 30, 1993
  Amount: $91,000
  Co-Principal Investigator (with Martin David)

National Institute on Aging
  Project: Wisconsin Longitudinal Study: Parents and Children at Age 50
  Period: June 1, 1991 to May 31, 1994
  Amount: $2,160,000
  Co-Investigator (with Robert Hauser)
Maurice MacDonald

National Institute on Aging
Project: The Wisconsin Longitudinal Study: Sibling Interviews
Period: December 1992 to November 1994
Amount: $396,956
Co-Principal Investigator with Robert M. Hauser

National Institute on Aging
Project: The Wisconsin Longitudinal Study: Improving Content and Coverage
Period: December 1992 to November 1994
Amount: $160,969
Co-Principal Investigator with Robert M. Hauser

National Institute of Child Health and Development, Center for Population Research
Project: The Health and Well-Being of Families in Transition
Period: January 1, 1992 to December 31, 1996
Amount: $7,400,000
Co-Investigator with Larry Bumpass and James Sweet

Robert M. La Follette Institute of Public Affairs Faculty Research Program
Project: State Administrative Practices and Food Stamp Participation
Period: July 1990 - May 1991
Amount: $13,000
Principal Investigator

Food and Nutrition Service, USDA
Project: Food Stamp Eligibility, Labor Supply, and Program Participation
Amount: $99,960
Principal Investigator

National Institute of Health, Mental Health
Project: Psychological and Economic Well-Being over the Life Cycle
Period: March 1988 - February 1991
Amount: $130,000
Co-Investigator, with Robin Douthitt and Randolph Mullis

Ford Foundation and Wisconsin Department of Health and Social Services
Project: Design and Research for a Reformed Child Support Enforcement Program
Period: July 1987 - June 1989
Amount: $1,500,000
Co-Investigator with Irwin Garfinkel

Wisconsin Agricultural Experimental Station, Regional Hatch Research Funding
Project: The Effect of Divorce on Child and Parental Time Allocation
Period: October 1987 - September 1989
Amount: $9,000
Co-Investigator with Robin Douthitt
Maurice MacDonald

Wisconsin Department of Health and Social Services
Project: Design and Research for a Reformed Child Support Enforcement Program
Period: September 2, 1986 to June 30, 1987
Amount: $30,000
Co-Investigator with Irwin Garfinkel

University of Wisconsin-Madison, Graduate School
Project: Static and Serial Analysis of Multiple Program Participation
Period: July 1, 1986 to June 30, 1987
Amount: $14,937

National Institute of Child Health and Development, Center for Population Research
Project: National Survey of Families and Households
Period: January 1, 1986 to December 31, 1988
Amount: $4,833,042
Co-Investigator (Principal Investigators: Larry Bumpass and James Sweet)

Wisconsin Department of Health and Social Services
Project: Wisconsin Survey of Children, Incomes and Program Participation
Period: January 1, 1985 to December 31, 1985
Amount: $150,000
Principal Investigator

University of Wisconsin-Madison Graduate School
Project: Food Stamps Cuts and Labor Supply
Period: July 1, 1984 to June 30, 1985
Amount: $20,250

Wisconsin Department of Health and Social Services
Project: Updating Wisconsin Basic Needs Assessments
Period: January 1, 1984 to June 1985
Amount: $150,000
Co-Principal Investigator with Sheldon Danziger

National Institute of Child Health and Development, Center for Population Research
Project: Behavioral Adaptations to the Changing Structure of the American Family and Households
Period: October 1, 1983 to April 30, 1985
Amount: $268,634
Co-Investigator with Larry Bumpass and James Sweet

USDA Food and Nutrition Service
Project: Evaluation of Impacts of the Omnibus Reconciliation Act of 1981 on Wisconsin Food Stamp Costs and Caseload
Period: June 7, 1983 to December 31, 1983
Amount: $47,468
Principal Investigator
Maurice MacDonald
Wisconsin Department of Health and Social Services, Division of Economic Assistance
  Project: Wisconsin Child Support Reform Project
  Period: July 1, 1980 to December 31, 1982
  Amount: $50,160
  Co-Principal Investigator with Irwin Garfinkel

University of Wisconsin-Madison Graduate School
  Project: Multivariate Analysis of the Determinants and Consequences of Child Support Payments
  Period: July 1, 1980 to June 30, 1981
  Amount: $16,720
  Principal Investigator

Social Security Administration, Office of Research and Statistics
  Project: Study of Basic Economic Needs of Welfare Dependent Families in Wisconsin
  Period: August 17, 1979 to September 30, 1982
  Amount: $747,869
  Co-Principal Investigator with Diane Colasanto and David Featherman

National Institute of Child Health and Development, Center for Population Research
  Project: Relative Income and Fertility
  Period: March 1, 1978 to August 1980
  Amount: $136,916
  Principal Investigator (co-Investigator, Ronald Rindfuss)
Martin Craig Seay
School of Family Studies and Human Services
Kansas State University  
318 Justin Hall  
Manhattan, KS 66506

E-mail: mseay@ksu.edu  
Office: (785) 532-1486  
Fax: (785) 532-5505

Education

<table>
<thead>
<tr>
<th>Degree</th>
<th>Institution</th>
<th>Major/Field</th>
<th>Year</th>
</tr>
</thead>
</table>
| Ph.D.  | University of Georgia | Housing and Consumer Economics  
Emphasis: Family Financial Planning | 2012 |
| B.S.F.C.S | University of Georgia | Housing and Consumer Economics  
Major: Housing | 2007 |

Awards and Scholarships

- CFP® Board of Standards Student Paper Award, Academy of Financial Services 25th Annual Meeting, 2011
- Eleonora M. Costa Graduate Scholarship, 2011-2012
- Certificate of Recognition, UGA Graduate School Teaching Portfolio Program, 2011
- Nominated: 2011 Graduate School Excellence in Teaching Award, 2011
- University of Georgia Outstanding Teaching Assistant Award, 2011
- Housing and Consumer Economics Departmental Graduate Assistantship, 2008 – 2011
- Emily Quinn Pou and Joe (J.W.) Pou Scholarship, 2010-2011
- Student Young Professional Conference Scholarship, ACCI, 2011
- Virginia Wilbanks Kilgore Scholarship, 2009 - 2010
- Student Conference Scholarship, ACCI, 2010
- Ameriprise Travel Award, 2010

Experience

- Assistant Professor, Kansas State University  
School of Family Studies and Human Services, Manhattan, KS  
2012 -

- Adjunct Professor, Brenau University  
College of Business & Mass Communications, Gainesville, GA  
2011

- Graduate Teaching Assistant, University of Georgia  
Department of Housing and Consumer Economics, Athens, GA  
2008 - 2011

Journal Publication

Clifford (Cliff) Armstrong Robb, PhD
313 Justin Hall
Manhattan, KS 66506
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785-532-1407

Education:

University of Missouri, Columbia       Columbia, MO
College of Human Environmental Sciences, Department of Personal Financial Planning
Date of Graduation: December 2007
Degree: Doctor of Philosophy  Major: Consumer Economics/Personal Financial Planning

The University of Alabama       Tuscaloosa, AL
College of Human Environmental Sciences, Department of Consumer Sciences
Date of Graduation: December 2004
Degree: Master of Science       Major: Consumer Economics/Personal Financial Planning

University of the South       Sewanee, TN
Date of Graduation: May 13, 2001
Degree Awarded: Bachelor of Arts       Major: Psychology       Minor: History
Graduated with Honors in the field of Psychology

Professional History:

Associate Professor: Kansas State University, August 5, 2012- present

Assistant Professor: University of Alabama, August 15, 2007-July 31, 2012

Teaching: Personal Finance, Computer Applications; University of Missouri, June 2006-May 2007


Teaching Assistant: University of Missouri, August 2005-May 2006

Teaching Assistant: University of Alabama, Fall 2003- Fall 2004

Lab Assistant (Psychology 101): University of the South, Spring 2001

Organizations and Professional Memberships:

American Council on Consumer Interests (ACCI; 2003-Present)
    Executive Leadership Board, Treasurer (2012)
    Consumer Policy Committee, Chair 2009-2011.

American Association of Family and Consumer Sciences (2006-Present)

Association for Financial Counseling and Planning Education (2008-Present)

Eastern Family Economics and Resource Management Association (EFERMA; 2008-Present)
    Program co-chair and Proceedings co-editor for 2010 conference
    Internal Steering Committee (2012-present)

Psi-Chi: National Honor Society for Psychology (2000-Present)

Publications:


**Book Chapters:**


**Works in Progress:**

Food Security, Financial Resources and the Spending Habits of College Students (with Knol, Gaines and Sickler)

Student well-being, emphasis on financial factors

Financial Advice (magazine) and Stock Performance (Carswell et al.)

Emergency Savings and Financial Literacy (Babiarz)

The FINRA Survey (Cude, Motolla)

**Presentations:**


FNCE (2010). Gaines, A., Knol, L. L., & **Robb, C. A.** Beverage intake differs by food security status in adult males but not females.


Research Support:

**Awarded:**

Award Amount: $6,000

Robb, C. A. Mary A. Crenshaw Endowed Research Fund Award. *Financial well-being and student wellness.*
Award Amount: $1,250

**Completed:**

Human Environmental Sciences Internal Seed Grant for Pilot Research Credit card spending habits and alcohol consumption study.
Award Amount: $2,650

Robb, C. A. (PI), Abdel-Ghany, M. Mary A. Crenshaw Endowed Research Fund Award. *Exploring the interrelationships between family strength, marital satisfaction, and economic well-being in times of economic stress.*
Award Amount: $2,000

Robb, C. A. Office of Institutional Effectiveness Active and Collaborative Learning Grant Development of course embedded assessment techniques for analysis of student learning outcomes
Award Amount: $750

Robb, C. A. Office of Institutional Effectiveness Active and Collaborative Learning Grant Development of rubrics for the evaluation of student learning
Award Amount: $750

Robb, C. A. (PI); Sharpe, D. L. (Faculty Sponsor) University of Missouri, Internal Grant, Research Council Grant. The Student Financial Survey. An in-house grant was obtained for the purpose of conducting a mass survey of the student body with regard to financial knowledge and reported behavior. Funds were available only to faculty, so a faculty sponsor was necessary.
My primary role was to construct the proposal, revise the student survey based on the present analysis, and handle the distribution of the survey and analysis of the data.

Award Amount: $1,580

**Robb, C. A. (PI)**
06/01/08 – 08/15/10
University of Alabama, Internal Grant, Research Grants Committee. *The College Student Financial Experience: Developing a Better Understanding of How Financial Issues Impact Students’ Lives.* This study is a qualitative analysis of student attitudes towards financial issues relating to paying for an education and will provide insight into the issues students face from their perspective.

Award Amount: $4,500

**Honors and Awards:**

- ACCI Journal of Consumer Affairs Best Reviewer Award (2011)
- ACCI Poster Award, Second Place for Financial knowledge and the gender gap (co-author, 2011)
- ACCI CFP Board Best Paper Award Winner for The growth of charitable estate planning among Americans nearing retirement (co-author, 2009).
- Mary A. Crenshaw Endowed Research Fund Award (College of Human Environmental Sciences, 2009)
- Jewell L. Taylor National Fellowship (AAFCS, 2006)
- ACCI travel grant (2004, 2005)
- Dean’s List for Academic Excellence at the University of the South
  Fall 1999, Spring 2000, Fall 2000, Spring 2001 (Minimum Semester GPA: 3.6)
- Order of Gownsmen at the University of the South (Academic Honor Society)

**Courses Taught:**

**Kansas State University:**

FSHS 405: Advanced Personal Financial Planning

FSHS 675: Field Study in Family Economics

**University of Alabama:**

CSM 404/504: Personal Investment Planning and Management

CSM 403/550: Consumer Economics

CSM 405/505: Public Policy: Social and Economic Issues


CSM 462: Professionalism in Consumer Science (multiple instructors)

**University Service:**

McNair Scholar Faculty Mentor (2008-2009)
College of Human Environmental Sciences Academic Bankruptcy Committee (Fall 2008 – Fall 2009)

College of Human Environmental Sciences Research Committee (Fall 2007 – 2012)

College of Human Environmental Sciences Graduate Studies Committee (Fall 2008 – 2012)

Editorial Board, Journal of Consumer Affairs


Editorial Board, Journal of Personal Finance

Reviewer, Family and Consumer Sciences Research Journal

Reviewer, Family Relations

Reviewer, Journal of Poverty

Reviewer, Social Science and Medicine

Board Member, Boys and Girls Club of West Alabama (2010-2012)

**Speaking Engagements:**

Alabama Financial Literacy Summit- Panel Discussant (2008)

DECA Career Development Conference- Title: Why Did I Fall for That? (2009)

Christ Church Tuscaloosa, Faith and Money (2011)