

Attachment 2
Academic Affairs Committee
Discussion Agenda Items – Supplemental Information

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

<u>Criteria</u>	<u>Program Summary</u>
1. Program Identification CIP	52.0804
2. Academic Unit	College of Human Ecology, School of Family Studies & Human Services
3. Program Description	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.
4. Demand/Need for the Program	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.
5. Comparative/Locational Advantage	A 2011 <i>Financial Planning</i> magazine article ranked Kansas State University’s Personal Financial Planning program as a top 10 financial planning program. In 2012, <i>Financial Planning</i> 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.

6. Curriculum	<p>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.</p> <p>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.</p> <p>Specific courses are outlined on the following pages.</p>
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.

**CURRICULUM OUTLINE
NEW DEGREE PROPOSALS
Kansas Board of Regents**

I. Identify the new degree: B.S. Personal Financial Planning

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

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

Core Courses:

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

Electives:	<u>varies by student</u>	<u>23-24</u>
Research:	<u>none required</u>	<u> </u>
Practica:	<u>none required</u>	<u> </u>

Total:120

IMPLEMENTATION YEAR FY 2013

Fiscal Summary for Proposed Academic Programs

Institution: Kansas State University

Proposed Program: Personal Financial Planning, B.S.

Part I. Anticipated Enrollment	Implementation Year		Year 2		Year 3	
	Full-Time	Part-Time	Full-Time	Part-Time	Full-Time	Part-Time
A. Full-time, Part-time Headcount:	40 B.S.	2 B.S.	50 B.S.	3 B.S.	60 B.S.	5 B.S.
B. Total SCH taken by all students in program	1,244		1,536		1,860	
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.						
	Fall, Implementation Year	Year 2		Year 3		
<u>Costs:</u>	\$493,000	\$502,000		\$625,000		
Salaries				(accounts for new prof.)		
OOE	\$25,000	\$25,000		\$25,000		
Total	\$518,000	\$527,000		\$650,000		

*** 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>

² http://www.cfp.net/downloads/2012_Household_Financial_Planning_Survey-Summary.pdf

³ See <http://www.investmentnews.com/article/20120411/BLOG03/120419983> and <http://money.usnews.com/careers/best-jobs/financial-adviser> for examples.

(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 planners⁴.

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.

⁴ <http://www.bls.gov/ooh/business-and-financial/personal-financial-advisors.htm>

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.

	2012	2011	2010	2009	2008
Bachelor's (juniors and seniors only)	34	28	38	29	28

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.

	2011-12	2010-11	2009-10	2008-09	2007-08
Bachelor's	13	12	9	18	23

(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 program⁵. 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 planners⁶. 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.

⁵ <http://www.financial-planning.com/gallery/fp/financial-planning-ten-schools-students-2675970-1.html>

⁶ <http://www.financial-planning.com/gallery/fp/25-Great-Financial-Planning-Schools-2681726-1.html>

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)

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- 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 need to support a bachelors and master’s curriculum. The proposed program meets these requirements as shown in the summary table below (note: curriculum vitas are attached in the appendix).

Faculty Member	Degree	Certification	10 th apt. w/KSU	Time Allocated to program	Biography
CORE FACULTY					
Sonya Britt, Assistant Professor	Ph.D.	CFP®, AFC®, CRC	1.0	40% BS	<p>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.</p> <p>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.</p> <p>Britt is known for her groundbreaking</p>

					<p>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.</p> <p>Britt recently published an edited book with Dr. Dottie Durband, <i>Student Financial Literacy: Campus-Based Program Development</i> (published by Springer), which leads readers through the process of developing or enhancing financial literacy programs for college students.</p> <p>Britt serves as an associate editor for the <i>Journal of Family and Economic Issues</i> in addition to serving as a regular journal reviewer for at least five other academic journals.</p>
Kristy Archuleta, Assistant Professor	Ph.D.	LMFT	1.0	40% BS	<p>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</p>

				<p>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.</p> <p>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, <i>Journal of Financial Therapy</i>. 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.</p> <p>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, <i>Financial Planning and Scales</i>, and co-authored several articles and two book chapters. As</p>
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					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.
Daniel Botz, Assistant Professor	J.D.		1.0	100% BS	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.
Ann Coulson, Assistant Professor	Ph.D.	CFP®, AFC	1.0	70% BS	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.
Maurice MacDonald, School Director and Professor	Ph.D.		1.0	5% BS	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, "Food, Stamps and Income Maintenance," made his mark as a national expert in the area of economics of welfare and food assistance.
Cliff Robb,	Ph.D.		1.0	40% BS	Dr. Cliff Robb is an Associate Professor

Associate Professor					of Personal Financial Planning in the School of Family Studies and Human Services. He earned his PhD in consumer economics and personal financial planning from the University of Missouri in 2007. His research interests include financial literacy (with an emphasis on the relationship between financial knowledge and observable financial behavior), college student financial behavior, and financial satisfaction and well-being. Dr. Robb has published his research in a number of peer-reviewed academic journals, including the Journal of Consumer Affairs, The Journal of Family and Economic Issues, the Journal of Financial Counseling and Planning, the Journal of Personal Finance, the Journal of Financial Therapy, the International Journal of Obesity, the College Student Journal, the Journal of College Student Retention, and the Family and Consumer Sciences Research Journal. In addition, he serves on the Editorial boards for the Journal of Consumer Affairs, the Journal of Personal Finance, and the Journal of Financial Counseling and Planning.
Martin Seay, Assistant Professor	Ph.D.	CRC	1.0	40% BS	Dr. Martin Seay's career objective is to provide meaningful and impactful research into consumer financial issues while training ethical, thoughtful, and well-rounded financial planners. His research interests' center on the intersection of housing wealth and family financial well-being, including investment in rental real estate, reverse mortgages, and reverse mortgage fraud. Additionally, Dr. Seay is interested in research methods utilizing secondary data sets.

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.

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

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.
6. Become skilled in applying retirement planning strategies.
7. Develop estate planning strategies for the benefit of clients.
8. Apply knowledge to help others meet challenges.
9. Solve real world problems.
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.
16. Obtain an understanding of 21st Century technologies.

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

Part I. Anticipated Enrollment	Implementation Year		Year 2		Year 3	
	Full-Time	Part-Time	Full-Time	Part-Time	Full-Time	Part-Time
A. Full-time, Part-time Headcount:	40 B.S.	2 B.S.	50 B.S.	3 B.S.	60 B.S.	5 B.S.
B. Total SCH taken by all students in program		1,224 B.S.		1,536 B.S.		1,860 B.S.
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.						
	Fall, Implementation Year		Year 2		Year 3	
Costs: Salaries	\$493,000		\$502,000		\$625,000 (accounts for one more professor)	
OOE	\$25,000		\$25,000		\$25,000	
Total	\$518,000		\$527,000		\$650,000	

* 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
Personal Financial Planning
School of Family Studies and Human Services
Kansas State University

317 Justin Hall
Manhattan, KS 66506
(785) 532-3541
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

Andrews & Associates, Manhattan, KS (February 2006 – May 2007)

- 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

Cumbie, Julie (Graduated August 2012): Kansas State University. Personal Financial Planning: Three essays on money arguments and financial behaviors. Co-chair.

Sages, Ronald (Graduated December 2012): Kansas State University. Personal Financial Planning: Three essays on the influence of self-esteem on retirement planning behaviors. Co-chair.

DOCTORAL COMMITTEE SERVICE IN PROGRESS***Chair***

Ammerman, Allen: Kansas State University. Personal Financial Planning.

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

Archuleta, K. L., & **Britt, S. L.** (2012). *Advanced Professional Issues in Financial Planning in the Netherlands*. Awarded \$2,500 by Kansas State University's Office of International Programs.

Britt, S. L. (2012). *Europe financial literacy summit and study abroad opportunities*. Awarded \$2,900 by Kansas State University's Academic Excellence Committee, Office of the Provost.

Klontz, B. T., **Britt, S. L.**, & Archuleta, K. L. (2012). *Behavioral Finance and Research and Theory in Financial Therapy*. Awarded \$10,000 by DCE Course Development Grant.

GRANTS, CONT.

Britt, S. L. (2011). *Physiological response to financial advisor's office environment*. Awarded \$3,330 by Angela Herbers, Inc.

Britt, S. L., Archuleta, K., & Grable, J. E. (2011). *Bio-monitoring/feedback equipment*. Awarded \$23,960 by Kansas State University's Academic Excellence Committee, Office of the Provost.

Britt, S. L. (2010). *Collaborative teaching and research in South Korea*. Awarded \$3,000 by Kansas State University's International Advisory Council.

Archuleta, K. L., & **Britt, S. L.** (2010). *Examining the effectiveness of traditional financial counseling: A collaborative project with Housing and Credit Counseling, Inc.* Awarded \$3,000 by Kansas State University's College of Human Ecology Sponsored Research Overhead Grant.

Archuleta, K. L., Grable, J. E., & **Britt, S. L.** (2010). *Personal Financial Planning Ph.D. Program*. Awarded \$30,000 by DCE Course Development Grant.

BOOKS

Durband, D. B., & **Britt, S. L.** (Eds.). (2012). *A guide to developing a university-based financial education program*. New York: Springer.

Nazarinia Roy, R., Schumm, W., & **Britt, S. L.** (in progress). *Transition to parenthood*. New York: Springer.

BOOK CHAPTERS

Britt, S. L., & Goetz, J. (2012). Financial education program partnerships. In D. B. Durband & S. L. Britt (Eds.), *Student financial literacy: Campus-based program development* (pp. 89-107). New York, NY: Springer.

Britt, S. L., Halley, R. E., & Durband, D. B. (2012). Training and development of financial education program staff. In D. B. Durband & S. L. Britt (Eds.), *Student financial literacy: Campus-based program development* (pp. 37-55). New York, NY: Springer.

Durband, D. B., & **Britt, S. L.** (2012). The case for financial education programs. In D. B. Durband & S. L. Britt (Eds.), *Student financial literacy: Campus-based program development* (pp. 1-8). New York, NY: Springer.

Halley, R. E., Durband, D. B., & **Britt, S. L.** (2012). Staffing and recruiting considerations for financial education programs. In D. B. Durband & S. L. Britt (Eds.), *Student financial literacy: Campus-based program development* (pp. 27-36). New York, NY: Springer.

PEER REVIEWED PUBLICATIONS

- Britt, S. L.** (under review). Introducing stress research into financial counseling, planning, and education. *Journal of Consumer Affairs*.
- Archuleta, K. L., Grable, J. E., & **Britt, S. L.** (under review). Financial Satisfaction, Harsh Start-up, and Shared Goals and Values: Developing an Understanding of the Association between Financial Satisfaction and Relationship Satisfaction. *Journal of Financial Counseling and Planning*.
- 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*.
- Sages, R. A., Cumbie, J. A., & **Britt, S. L.** (in press). The correlation between anxiety and money management. *College Student Journal*.
- Britt, S. L.**, Cumbie, J. A., & Bell, M. M. (in press). The influence of locus of control on student financial behavior. *College Student Journal*.
- Gale, J., Goetz, J., & **Britt, S. L.** (2012). Preliminary considerations in the development of the Financial Therapy Association. *Journal of Financial Therapy*, 3(2).
- Klontz, B. T., & **Britt, S. L.** (2012). How clients' money scripts predict their financial behaviors. *Journal of Financial Planning*, November, 33-43.
- Grable, J. E., & **Britt, S. L.** (2012). Financial news and client stress: Understanding the association from a financial planning perspective. *Financial Planning Review*. (Korean journal)
- Dew, J., **Britt, S. L.**, & Huston, S. J. (2012). Examining the relationship between financial issues and divorce. *Family Relations*, 61, 615-628. DOI:10.1111/j.1741-3729.2012.00715.x
- Klontz, B. T., **Britt, S. L.**, Archuleta, K. L., & Klontz, T. (2012). Disordered money behaviors: Development of the Klontz Money Behavior Inventory. *Journal of Financial Therapy*, 3(1), 17-42.
- Britt, S. L.**, & Huston, S. J. (2012). The role of money arguments in marriage. *Journal of Family and Economic Issues*, 33(4), 464-476. DOI 10.1007/s10834-012-9304-5.
- Grable, J. E., & **Britt, S. L.** (2012). Assessing client stress and why it matters to financial advisors. *Journal of Financial Service Professionals*, 66(2), 39-45.
- Britt, S. L.**, Grable, J. E., Cumbie, J., Cupples, S., Henegar, J., Schindler, K., & Archuleta, K. L. (2011). Student financial counseling: An analysis of a clinical and non-clinical sample. *Journal of Personal Finance*, 10(2), 95-121.
- Archuleta, K. L., **Britt, S. L.**, Tonn, T. J., & Grable, J. E. (2011). Financial satisfaction and financial stressors in marital satisfaction. *Psychology Reports*, 108(2), 563-576.

PEER REVIEWED PUBLICATIONS, CONT.

- Grable, J. E., & **Britt, S. L.** (2011, January). A test of the video narration effect on financial risk-tolerance assessment. *Journal of Financial Planning: Between the Issues*. Available at: <http://www.fpanet.org/journal/BetweenTheIssues/LastMonth/Articles/ATestoftheVideoNarrationEffect>
- Grable, J. E., & **Britt, S. L.** (2011). An investigation of response bias associated with electronically delivered risk-tolerance assessment. *Journal of Financial Therapy*, 2(1), 43-52.
- Klontz, B. T., **Britt, S. L.**, Mentzer, J., & Klontz, P. T. (2011). Money beliefs and financial behaviors: Development of the Klontz Money Script Inventory. *Journal of Financial Therapy*, 2(1), 1-22.
- Britt, S. L.**, Huston, S. J., & Durband, D. B. (2010). The determinants of money arguments between spouses. *Journal of Financial Therapy*, 1(1), 41-59.
- Durband, D. B., **Britt, S. L.**, & Grable, J. E. (2010). Personal and family finance in the marriage and family therapy domain. *Journal of Financial Therapy*, 1(1), 7-22.
- McGill, S., Grable, J., & **Britt, S.** (2010). The Financial Therapy Association: A brief history. *Journal of Financial Therapy*, 1(1), 1-6.
- Mentzer, J., **Britt, S. L.**, Samuelson, J., Herrera, J., & Durband, D. B. (2010). An annotated bibliography in financial therapy, *Journal of Financial Therapy*, 1(1), 61-85.
- Grable, J. E., McGill, S., & **Britt, S.** (2009). Risk tolerance estimation bias: The age effect. *Journal of Business & Economics Research*, 7(7), 1-12.
- *Grable, J. E., **Britt, S. L.**, & Webb, F. J. (2008). Environmental and biopsychosocial profiling as a means for describing financial risk-taking behaviors. *Financial Counseling and Planning*, 19(2), 3-18.
***Won Outstanding Journal Article Award by Association for Financial Counseling and Planning Education in November 2009**
- ***Britt, S.**, Grable, J. E., Nelson Goff, B. S., & White, M. (2008). The influence of perceived spending behaviors on relationship satisfaction. *Financial Counseling and Planning*, 19(1), 31-43.
***Selected as an eXtension publication on "Financial Security for All" website**
- Grable, J. E., **Britt, S.**, & Cantrell, J. (2007). An exploratory study of the role financial satisfaction has on the thought of subsequent divorce. *Family and Consumer Sciences Research Journal*, 36(2), 130-150.
- Grable, J. E., & **Britt, S.** (2006). A further examination of the validity of the Kansas Marital Satisfaction Scale: Implications for financial consultants. *Journal of Personal Finance*, 5(2), 17-31.

PEER REVIEWED PUBLICATIONS, CONT.

Britt, S. (2005). *Family Financial Behaviors*. Manhattan, KS: Kansas State University. (available through Kansas State University Hale Library)

Jariah, M., Husniyah, A. R., Laily, P., & **Britt, S.** (2004). Financial behavior and problems among university students: Need for financial education. *Journal of Personal Finance*, 3(1), 82-96.

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)

Sages, R. A., & **Britt, S. L.** (2012). Introducing clients to financial therapy. *Trusts & Estates Magazine, March*, Retrieved from http://subscribers.trustsandestates.com/estate_planning/estate_introducing_clients_financial/wall.html?return=http://subscribers.trustsandestates.com/estate_planning/estate_introducing_clients_financial/index.html.

Britt, S. L., & Grable, J. E. (2011). Risky business. *Financial Planning, May*, Retrieved from http://www.financial-planning.com/fp_issues/2011_5/risky-business-2672781-1.html?pg=1&pg=2&.

Grable, J. E., & **Britt, S. L.** (2010). Financial planning internships: A student faculty perspective. *The Register, March*, 10-11.

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.

Britt, S. L., Archuleta, K. L., Britt, J. D., Bell, M. M., Robb, C., & Seay, M. (2012, September). Stress, personality, and risk tolerance. Research paper at *Financial Therapy Association* annual conference: Columbia, MO.

Britt, S. L., Fernatt, F., Nelson, J. S., Yook, M., Canale, A., Blue, J., Stutz, K., & Tibbetts, R. (2012, April). Does financial counseling really work. Research paper at *American Council on Consumer Interests* annual conference: Memphis, TN.

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

Britt, S. L., Bell, M., & Cumbie, J. (2012, April). The influence of locus of control of student financial behavior. Research poster at the *American Council on Consumer Interests* annual conference: Memphis, TN.

- Paper published in *College Student Journal* (2012)

Bell, M., Nelson, J. S., Spann, S., Molloy, C., **Britt, S. L.,** & Nelson Goff, B. (2012, April). The impact of financial resources on soldiers' psychological well-being. Research poster at *American Council on Consumer Interests* annual conference: Memphis, TN.

Bell, M. M., Grable, J. E., & **Britt, S. L.** (2011, September). Factors influencing financial satisfaction. Research poster at *Financial Therapy Association* annual conference: Athens, GA.

Gale, J., Goetz, J., & **Britt, S. L.** (2011, September). Preliminary considerations for the development of the financial therapy discipline. Paper at *Financial Therapy Association* annual conference: Athens, GA.

- Paper published in *Journal of Financial Therapy* (2012)

Sages, R. A., Cumbie, J. A., & **Britt, S. L.** (2011, September). Does mental health really influence financial behavior? Research paper at *Financial Therapy Association* annual conference: Athens, GA.

- Paper published in *College Student Journal* (2012)

Archuleta, K. L., **Britt, S. L.,** & Nazarinia Roy, R. (2011, September). What is theory? Moving financial therapy forward through theory. Research paper at *Financial Therapy Association* annual conference: Athens, GA.

PEER REVIEWED PRESENTATIONS AND POSTERS, CONT.

- Britt, S. L., & Huston, S. J.** (2011, April). The role of money arguments in marriage. Research paper at *American Council on Consumer Interests* annual conference: Washington, D.C.
- Paper published in *Journal of Family and Economic Issues* (2012)
- Cumbie, J., Cupples, S., Henegar, J., Schindler, K., Archuleta, K. L., **Britt, S. L.**, & Grable, J. E. (2011, April). Student financial counseling: A study of clinical and non-clinical sample. Research paper at *American Council on Consumer Interests* annual conference: Washington, D.C.
- Paper published in *Journal of Personal Finance* (2011)
- Huston, S. J., **Britt, S. L.**, Durband, D. B., & Grable, J. E. (2012, September). Retaining clients through improved relationship satisfaction. Research paper at *Academy of Financial Services* annual conference: Denver, CO.
- Paper published in *Journal of Family and Economic Issues* (2012)
- Grable, J. E., & **Britt, S. L.** (2010, September). Risk-tolerance assessment and the narrator effect. Research paper at *Academy of Financial Services* annual conference: Denver, CO.
- Paper published in *Journal of Financial Planning* (2011)
- Klontz, P. T., Klontz, B. T., & **Britt, S. L.** (2010, September). Mind over money: The hidden brain: Recognizing and addressing financially disordered behaviors. Research paper at *Academy of Financial Services* annual conference: Denver, CO.
- Britt, S. L.**, Huston, S. J., Durband, D. B., & Finke, M. S. (2010, April). The determinants of money arguments between married couples. Research paper at *American Council on Consumer Interests* annual conference: Atlanta, GA.
- Paper published in *Journal of Financial Therapy* (2010)
- Woodyard, A., Carr, N., Grable, J. E., & **Britt, S. L.** (2010, April). Are recipients of payday and car title loans more risk tolerant than others? Research poster at *American Council on Consumer Interests* annual conference: Atlanta, GA.
- Britt, S. L.**, Huston, S. J., & Durband, D. B. (2009, November). Money arguments and marriage. Research paper at *National Council on Family Relations* annual conference: San Francisco, CA.
- Paper published in *Journal of Financial Therapy* (2010)
- Baker, A. K., & **Britt, S. L.** (2009, November). Integrating personal finance into addiction studies. Poster at *Association for Financial Counseling and Planning Education* annual conference: Scottsdale, AZ.
- Britt, S. L.**, & Huston, S. J. (2009, July). Household saving behavior as predicted by behavior life cycle hypothesis. Research paper at *American Council on Consumer Interests* annual conference: Milwaukee, WI.

PEER REVIEWED PRESENTATIONS AND POSTERS, CONT.

- Grable, J. E., Schuchardt, J., Goetz, J., Collins, J. M., Archuleta, K., & **Britt, S.** (2009, July). Clinical and experimental methods. Forum at *American Council on Consumer Interests* annual conference: Milwaukee, WI.
- Durband, D. B., **Britt, S. L.**, & Grable, J. E. (2008, November). Personal and family finance in the marriage and family therapy domain. Research poster at *Association for Financial Counseling and Planning Education* annual conference: Orange County, CA.
- Paper published in *Journal of Financial Therapy* (2010)
- Huston, S., Hampton, V., Durband, D., Finke, M., Smith, H., & **Britt, S.** (2008, November). Financial literacy: Introducing a framework & instrument for assessment. Research poster at *Association for Financial Counseling and Planning Education* annual conference: Orange County, CA.
- Paper published in *Journal of Consumer Affairs* (2010) – noted in acknowledgements
- Britt, S. L.**, & Grable, J. E. (2008, October). The determinants of financial satisfaction among working adults. Research paper at *Academy of Financial Services* annual conference: Boston, MA.
- Britt, S. L.** (2008, July). Facilitating Healthy financial decision making in recovering students. Curriculum at *Association for Recovery Schools* annual conference: Nashville, TN.
- Britt, S. L.** (2008, April). The influence of perceived spending behaviors on relationship satisfaction. Research poster at *Texas Tech University Graduate Student Research Competition*: Lubbock, TX.
- Won 1st prize in Human Sciences category
 - Paper published in *Journal of Financial Counseling and Planning* (2008)
- Grable, J. E., Webb, F., **Britt, S.**, & Park, J. (2007, November). The effect of religiosity on financial risk taking. Research paper at *Association for Financial Counseling and Planning Education* annual conference: Tampa, FL.
- Britt, S.** (2005, November). Using financial behaviors to project relationship satisfaction. Research paper at *Association for Financial Counseling and Planning Education* annual conference: Scottsdale, AZ.
- Paper published in *Journal of Financial Counseling and Planning* (2008)

CONFERENCE PROCEEDINGS (NOT LISTED ELSEWHERE)

Grable, J. E., & **Britt, S. L.** (2012). Financial news and client stress: Understanding the association from a financial planning perspective. *Korea Financial Planning Association* (invited research presentation—not present)

- Paper published in *Financial Planning Review* (2012)

Grable, J. E., **Britt, S.**, Anderson, N., & Dale, A. (2011). Credit card behavior as a function of risk attitude, impulsivity, and a mother's socialization factors. *Proceedings of the Association for Financial Counseling and Planning Education*, 100-110. (paper presentation—not present)

Archuleta, K. L., Grable, J. E., & **Britt, S. L.** (2010). Shared goals and values: Towards an understanding of financial and marital satisfaction. *Proceedings of the Eastern Family Economics and Resource Management Association*. (paper presentation—not present)

- Paper published in the *Journal of Financial Counseling and Planning* (2012)

Grable, J., Archuleta, K., Webb, F., & **Britt, S.** (2009). Gender difference in risk tolerance: Are women really different than men? *Proceedings of the Association for Financial Counseling and Planning Education*, 34-44. (paper presentation—not present)

Grable, J. E., & **Britt, S.** (2007). The influence of mood on the willingness to take financial risks. *Consumer Interests Annual*, 53. (conference session—not present)

Jariah, M., Azizah Haron, S., A. R., Paim, L., & **Britt, S.** (2005). Purchase intentions among university students in Malaysia receiving student loans. *Consumer Interests Annual*, 51, 249-250. (poster session—not present)

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*

Britt, S. L., & Grable, J. E. (2012, May). Communication and counseling strategies: Managing client stress and risk tolerance biases. Research paper at *Financial Planning Association* annual retreat: Scottsdale, AZ.

Britt, S. L., & Grable, J. E. (2012, March). Stress: The effect it has on client relationships. Research paper at *Financial Planning Association* business solutions conference: San Francisco, CA.

Grable, J. E., & **Britt, S. L.** (2012, February). Facilitating trust and communication in the client-planner relationship by confronting client and planner stress. Research paper at *Insurance and Financial Advisors CE* (IFACE) conference: Manhattan, KS.

INVITED PRESENTATIONS, CONT.

- Britt, S. L.** (2012, May). Financial therapy: Considering the principles of financial therapy in general financial education. Presentation for *Virginia Jump\$tart Coalition*: Skype.
- Britt, S. L.**, Kaus, J., & Archuleta, K. L. (2011, September). Financial advice. Presentation for *Women of K-State Brown Bag Series*: Manhattan, KS.
- Britt, S. L.**, & Grable, J. E. (2011, October). Pictures of physiological stress: How financial planners can reduce client stress and increase client trust. Research paper at *Financial Planning Association* annual conference: San Diego, CA.
- Britt, S. L.** (2011, May). Planning, coaching, counseling: Putting the pieces together. Presentation at *National Association of Personal Financial Advisors* annual conference: Salt Lake City, UT.
- Britt, S. L.** (2011, February). Retail therapy. Presentation at *Fort Riley's Woman's Conference*: Fort Riley, KS.
- Britt, S. L.** (2011, February). When couples argue. Research paper at *Insurance and Financial Advisors CE* (IFACE) conference: Manhattan, KS.
- Britt, S. L.** (2010, May). The influence of money arguments on spousal relationship satisfaction. Research paper at *Ewha Woman's University's "Advances and Applications in Consumer Studies Research" International Series*: Seoul, South Korea.
- Britt, S. L.** (2010, February). College students and financial education. Presentation at *Iowa State University 1st Annual Financial Capability Symposium*: Ames, IA.

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.
- InvestmentNews. (March 25, 2012). Secrets to success for advisers? Get an easy chair.
- 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.
- Dagbladet. (Danish Magazine) (May 14, 2011). Psykologi og torre tal. (Psychology and money).
- 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?

New York Times. (May 6, 2011). Net worth, self-worth, and how we look at money.
Also cited in taipeitimes.com, yourmentalwealth.com, rssbroadcast.com

Financial Advisor Magazine. (May 2011). High Anxiety.

K-State Media Relations. (April 18, 2011). Combating money woes: Study looking at financial resiliency of soldiers.
Also cited on Topeka Channel 49 ABC News, KJCK radio, Newswise.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.

InvestmentNews. (July 11, 2010). Clients acting irrationally? Hire a therapist – for them.

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. (March 2, 2010). Three K-State Institute of Personal Financial Planning faculty members serving on first Board of Directors of the Financial Therapy Association.

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

Topeka Channel 49 ABC News. (August 17, 2009). Keeping a budget in college.

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)

- Regularly asked to review empirical articles for *Family Relations*, *Journal for Financial Counseling and Planning*, *Journal of Marriage and Family*, *Journal of Financial Therapy*, *Journal of Family and Economic Issues*, *Family and Consumer Sciences Research Journal*, *Journal of Consumer Affairs*

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)

Association for Financial Counseling and Planning Education (2005 – 2010)

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

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.
- Assist in planning and organizing multi-state conference proceedings. (Annual conference attendance in 2006 = 192; 2007 = 317; 2008 = 335; 2009 = 225; 2010 = 273; 2011 = 210; 2012 = 250.)
- 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 756: Financial Counseling/Fall 2010, 2011, 2012
- FSHS 888: Research Methods in FSHS I/Fall 2009, 2010-2012
- FSHS 105: Introduction to Personal Family Finance/Spring 2009, 2010-2012; Summer 2010-2012
- FSHS 301: The Helping Relationship/Summer 2006-2007
- FSHS 704: Money and Relationships/May Intersession 2006, 2007, 2008
- FSHS 766: Insurance Planning for Families/Spring 2006-2009
- FSHS 772: Personal Income Tax/Fall 2005, 2006, 2008

Courses Developed (not previously offered):

- FSHS 756: Financial Counseling/Fall 2010
- FSHS 105: Introduction to Personal Financial Planning – Online/Summer 2010, Spring 2011
- 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

- Flammer, B. (in process). Kansas State University. Personal Financial Planning.

- Lunsford, R. (in process). Kansas State University. Personal Financial Planning.
- Asebedos, G. (in process). Kansas State University. Personal Financial Planning.
- Powell, S. (in process). Kansas State University. Personal Financial Planning.
- Richmond, S. M. (in process). Kansas State University. Personal Financial Planning.

Master's Committee Member

- Westover, B. (2009). *My theoretical integrative model and approach: Final capstone paper*. Kansas State University. Marriage and Family Therapy.
- Ford, M. R. (2010). *An integrative approach to empowerment*. Kansas State University. Marriage and Family Therapy.
- Weiss Cook, L. (2011). Non-thesis option. Kansas State University. Personal Financial Planning.
- Moore, A. (2012). *Conceptualizing a model of collaboration: A qualitative exploration of the collaboration between financial planners and mental health professionals*. University of Georgia. Personal Financial Planning.
- George, J. (in process). Kansas State University. Marriage and Family Therapy.

Doctoral Committee Chair/Co-chaired

- Boyle, J. (2012). *Shared money, less conflict, stronger marriages: The relationship between money ownership perceptions, negative communication, financial satisfaction, marital satisfaction and marital instability*. Kansas State University. Marriage and Family Therapy.
- Asebedo, S. (in process). Kansas State University. Personal Financial Planning.
- Coffman, B. (in process). Kansas State University. Personal Financial Planning.
- Cupples, W. (in process). Kansas State University. Personal Financial Planning.
- Dale, A. (in process). Kansas State University. Personal Financial Planning.
- Henegar, J. (in process). Kansas State University. Personal Financial Planning.
- Rasure, E. (in process). Kansas State University. Personal Financial Planning.
- Schindler, K. (in process). Kansas State University. Personal Financial Planning.
- Williams, K. (in process). Kansas State University. Personal Financial Planning.
- Zimmerman, L. (in process). Kansas State University. Personal Financial Planning.

Doctoral Committee Member

- Cumbie, J. (2012). *Three essays on money arguments and financial behaviors*. Kansas State University. Personal Financial Planning.
- Anderson, N. (in process). Kansas State University. Personal Financial Planning.
- Carr, N. (in process). Kansas State University. Personal Financial Planning.
- Spann, S. (in process). Kansas State University. Personal Financial Planning.

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

Archuleta, K. L., Dale, A., & Spann, S. (in press). College students and financial distress: Exploring debt, financial satisfaction, and financial anxiety. *Journal of Financial Counseling and Planning*.

Archuleta, K. L. (in press). Negotiating financial management roles to increase relationship satisfaction. *Marriage & Family Review*.

Klontz, B., Britt, S. L., Archuleta, K. L., & Klontz, T. (2012). Disordered money behaviors: Development of the Klontz Money Behavior Inventory. *Journal of Financial Therapy*, 3(1), 17-42.

Britt, S. L., Grable, J. E., Cumbie, J., Cupples, S., Henegar, J., Schindler, K., & Archuleta, K. L. (2011). Student financial counseling: An analysis of a clinical and non-clinical sample. *Journal of Personal Finance*, 10 (2), 95-121. Note: Journal issue was published in February 2012.

- Ford, M. R., Baptist, J., & Archuleta, K.L. (2011). A theoretical approach to financial therapy: The development of the Ford Financial Empowerment Model. *Journal of Financial Therapy*, 2(2), 20-40.
- Archuleta, K. L., Britt, S.L., Tonn, T. J., & Grable, J. E. (2011). Financial satisfaction and financial stressors in marital satisfaction. *Psychological Reports*, 108 (2), 563-576.
- *Henry, S. B., *Smith, D. B., *Archuleta, K., *Sanders-Hahs, E., Nelson Goff, B. S., Reisbig, A. M. J., Schwerdtfeger, K. L., Bole, A., Hayes, E., Hoheisel, C. B., Nye, B., Osby-Williams, J., & Scheer, T. (2011). Trauma and couples: Mechanisms in dyadic functioning. *Journal of Marital & Family Therapy*, 37(3), 319-332.
- *Denotes equal contribution of each author.
- Grable, J. E., & Archuleta, K. L. (2009). An evaluation of journal publication evaluation factors. *Journal of Personal Finance*, 8, 13-22. Note: Journal issue was published in December 2010.
- 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.
- Archuleta, K. L., & Russell, C. S. (2009). Farm wives level of involvement in farm management roles and marital quality. *Rural Mental Health*, 33, 9-25.
- Schwerdtfeger, K. L., Osby-Williams, J., Hoheisel, C. B., Nye, B., Nelson Goff, B. S., Reisbig, A. M. J., Archuleta, K., Henry, S. B., Bole, A., Hayes, E., Sanders-Hahs, E., Scheer, T., & Smith, D. B. (2008). Individual symptoms and coping resources reported by trauma survivors and their partners: A qualitative research study with clinical couples. *Journal of Couple and Relationship Therapy*, 7(3), 187-209.
- Archuleta, K. L. (2006). Moving rural supervision to a higher standard: An overview of literature and its implications on providing improved supervision to marriage and family therapists. *Rural Mental Health*, 31, 19-24.
- Nelson Goff, B. S., Reisbig, A. M. J., Bole, A., Scheer, T., Hayes, E., Archuleta, K. L., Henry, S. B., Hoheisel, C. B., Nye, B., Osby, J., Sanders, E., Schwerdtfeger, K. L., & Smith, D. B. (2006). The effects of trauma on intimate relationships: A qualitative study with clinical couples. *American Journal of Orthopsychiatry*, 76 (4), 451-60.

Books and Book Chapters

- Grable, J. E., & Archuleta, K. L. (in press). Learning outcome 75. *CFP Board of Standards Learning Outcomes*. Washington D.C.: CFP Board.
- Shoup Olsen, C., & Archuleta, K. L. (2011). Rural families. In S. Ballard & A. Taylor (Eds.), *Family life education with diverse populations (19-40)*. Thousand Oaks, CA: Sage Publications.
- Archuleta, K. L., & Grable, J. E. (2010). The future of financial planning and counseling: An introduction to financial therapy. In J. E. Grable, K. L. Archuleta, & R. Nazarinia (Eds.), *Financial planning and counseling scales (p. 33-59)*. New York: Springer Publications.

Grable, J. E., Archuleta, K. L., & Nazarinia, R. (Eds.). (2010). *Financial planning and counseling scales*. New York: Springer Publications.

Refereed Professional Proceedings

Archuleta, K. L., Grable, J. E., & Britt, S. L. (2010). Shared goals and values: Towards an understanding of financial and marital satisfaction. *Proceedings of the Eastern Family Economics and Resource Management Association*. Retrieved from <http://mrupured.myweb.uga.edu/pdfs/EFERMA%202009%20Goals%20and%20Values%2012-07-09.pdf>

Grable, J., Archuleta, K., Webb, F., & Britt, S. (2009). Gender difference in risk tolerance: Are women really different than men? *Proceedings of the Association for Financial Counseling and Planning Education*, 34-44.

Archuleta, K. L., & Tonn, T. J. (2006). Testing the effectiveness of using financial satisfaction and stressors to predict marital stability. *Proceedings of the Association for Financial Counseling and Planning Education*, 40-48.

Other Publications

Archuleta, K. L. (2012). Looking towards the future of financial planning: An overview of the emerging field of financial therapy in the U.S. *Journal of Financial Planning Korea*.

*Archuleta, K. L., *Dale, A., *Danford, D., *Williams, K., *Rasure, E., Burr, E., Schindler, K., & Coffman, B. (2011). An initial membership profile of the Financial Therapy Association. *Journal of Financial Therapy*, 2 (2), 1-19.

*Denotes equal contribution of each author.

Archuleta, K. L., & Grable, J. E. (2011). Editorial. *Journal of Financial Therapy*, 2(2), i-iv.

Olsen, C. S., & Archuleta, K. L. (2011). *FamilyTALK: Making it Work*. Kansas State University Agricultural Experiment Station and Cooperative Service, MF2996.

Olsen, C. S., & Archuleta, K.L. (2011). *FamilyTALK: Making it Work*. Leader's Guide, Kansas State University.

Archuleta, K. L. & Grable, J. E. (2011). Editorial. *Journal of Financial Therapy*, 2(1), i-iii.

Archuleta, K. L. & Grable, J. E. (2010). Editorial. *Journal of Financial Therapy*, 1(1), i-iii.

Archuleta, K. L., & Griffin, C. (2003). Reaching out to rural families in need. *National Council on Family Relations Report: Linking Family Research, Education and Practice*, 48(1), F14-F15.

Archuleta, K.L. (2003, Reprint July 2004). Should I be feeling this way? *Making It Work: Resources for Rural Communities*, 1, 7. Kansas State University, Manhattan, KS.

Manuscripts in Progress or Submitted for Publication

Archuleta, K. L., & Grable, J. E., & Britt, S. L. (revise/resubmit). *Financial satisfaction, harsh start-up, and shared goals and values: Developing an understanding of the association between financial satisfaction and relationship satisfaction*. Manuscript submitted for publication.

Henegar, J., Archuleta, K.L., Grable, J. E., Britt, S. L., Anderson, N., Dale, A. (revise/resubmit). *Credit card behavior as a function of impulsivity and a mother's socialization factors*. Manuscript submitted for publication.

Klontz, B., Britt, S. L., & Archuleta, K. L. (submitted). *Financial therapy: Theory, research, & practice*. Book proposal submitted to publisher.

Archuleta, K.L., Burr, E., Dale, A., Canale, A., Danford, D., Rasure, E., Nelson, J., Williams, K., Schindler, K, Coffman, B., & Horwitz, E. (submitted). *What is financial therapy? Discovering the mechanisms and aspects of an emerging field*. Manuscript submitted for publication.

Archuleta, K. L., & Grable, J. E. (submitted). *Does it matter who makes the financial decisions? An exploratory study of married couples' financial decision-making and relationship satisfaction*. Manuscript submitted for publication.

Grable, J. E., & Archuleta, K. L. (in process). Financial counseling and coaching. In H. K. Baker & V. Ricciardi's (Eds.), *The psychology of financial planning and investing*. Hoboken, NJ: John Wiley & Sons.

Archuleta, K. L. (in process). *Understanding Couple Relationships and Money: Development of the Couples and Finances Theory*. Paper prepared and will be presented for Theory Construction and Research Methodology workshop at the annual conference of the National Council on Family Relations, Phoenix, AZ.

Archuleta, K. L., Coffman, B., & Olsen, C. S. (in process). *Determinants of farm women's business satisfaction: An exploratory study*.

Schindler, K., Archuleta, K. L., Dale, A. K., & Spann, S. M. (in process). *Using financial knowledge to predict student debt load*.

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
 Reviewer, *Journal of Financial Counseling & Planning*, 2011-present
 Conference Paper Reviewer, Financial Therapy Association, 2011
 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

Andrews & Associates, Inc., Manhattan, KS

August 2007-present

- 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

Couple Talk Facilitator, Clay Center, KS & Wamego, KS

October 2002, November 2003

- 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

Kansas State University's Office of International Programs (2012). *Advanced Professional Issues in Financial Planning in the Netherlands*. P.I.s Archuleta, K. L., & Britt, S. L. \$2,500

DCE Course Development Grant, Kansas State University (2012). *Behavioral Finance and Research and Theory in Financial Therapy*. P.I.s Klontz, B. T., Britt, S. L., & Archuleta, K. L. \$10,000.

Kansas State University Academic Excellence (2011). *Personal Financial Planning Bio-Monitoring*. P.I.s Britt, S. L., Archuleta, K. L., & Grable, J. E. \$23,960.

Human Ecology SRO Grant, Kansas State University (2010). *Examining the Effectiveness of Traditional Financial Counseling: A Collaborative Research Project with Housing and Credit Counseling, Inc.* P.I.s Archuleta, K. L. & Britt, S. L., \$3,000.

DCE Course Development Grant, Kansas State University (2010). *Introduction to Personal Financial Planning Online*. P.I. Archuleta, K. L. \$2,500.

DCE Program Development Grant, Kansas State University (2010). *Personal Financial Planning Ph.D. Program*. P.I.s Archuleta, K. L., Grable, J. E., & Britt, S. L. \$30,000.

Kansas Soybean Commission. (2010). *Women Managing the Farm*. P.I.s Archuleta, K. L., & Olsen, C. S. \$5,000.

U.S. Department of Agriculture, Risk Management Agency, Community Outreach and Assistance Partnership Program. (2009-2010). *Women Managing the Farm*. P.I.s Olsen, C. S., Archuleta, K. L., & Griffin, C. \$60,000.

University Small Research Grants, Kansas State University. (2008). *Solution Focused Therapy with Financial Issues*. P.I. Archuleta, K. L. \$2,500.

U.S. Department of Agriculture, Risk Management Agency, Community Outreach and Assistance Partnership Program. (2007). *Women Managing the Farm*. P.I.s Griffin, C., & Olsen, C. S., *Kristy Archuleta & Sarah Fogleman. \$100,000.

U.S. Department of Agriculture, Risk Management Agency, Community Outreach and assistance Partnership Program. (2006). *Women Managing the Farm*. P.I.s Griffin, C., & Olsen, C. S., *Archuleta, K. L. & Fogleman, S. \$50,000

U.S. Department of Agriculture, Risk Management Agency, Community Outreach and Assistance Partnership Program. (2005). *Women Managing the Farm*. P.I.s Griffin, C. & Olsen, C. S., *Archuleta, K. L., \$115,000.

*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

Archuleta, K. L., & Grable, J. E. *Financial therapy: A new area of research, practice, & collaboration*. Invited presentation to the Korean Academy of Financial Planning, Cheon Ahn, South Korea.

Henegar, J., Sages, R., Schindler, K., Carr, N., Williams, S., Coffman, B., Cumbie, J., Cupples, W., Bell, M., Archuleta, K.L., & Grable, J. E. (May 2012). *Financial planning in the U.S.* Joo, S. (Moderator). Invited panel member at Korean Financial Planning, Seoul, South Korea.

Carr, N., Henegar, J, Sages, R., Williams, S., Coffman, B., Archuleta, K. L., Bell, M., Cumbie, J., Cupples, S., & Grable, J. E. (May 2012). *Financial planning in the U.S.* Joo, S. (Moderator). Invited panel member at Korean Financial Planning Standards Board and Korean Financial Planning Association Meeting, Seoul, South Korea.

National Refereed Presentations

Archuleta, K.L., Burr, E., Dale, A., Canale, A., Danford, D., Rasure, E., Nelson, J., Williams, K., Schindler, K, Coffman, B., & Horwitz, E. (September 2012). *What is financial therapy? Discovering the mechanisms and aspects of an emerging field*. Presentation at the annual conference of the Financial Therapy Association, Columbia, MO. (Outstanding Paper Award)

Britt, S. L., Archuleta, K. L., Britt, J. D., Bell, M. M., Robb, C., & Seay M. (September 2012). *Stress, personality and risk tolerance*. Presentation at the annual conference of the Financial Therapy Association, Columbia, MO.

Ford, M., Baptist, J. A., Archuleta, K. L., & McCoy, M. A. (September 2012). *A live demonstration of the Ford financial empowerment model*. Presentation at the annual conference of the Financial Therapy Association, Columbia, MO.

- Archuleta, K. L., Dale, A., Schindler, K.A., & Spann, S. M. (November 2011). *Using financial knowledge to predict student debt load*. Research poster presented at the annual conference of the Association of Financial Counseling and Planning Education Conference, Jacksonville, FL.
- Archuleta, K. L., & Grable, J. (November 2011). *Does it matter who makes the financial decisions? An exploratory study of married couples' financial decision-making and relationship satisfaction*. In R.R. Nazarinia Roy (Chair), *Finances and Relationships across the Life-Span*. Symposium conducted at the annual conference of the National Council of Family Relations, Orlando, FL.
- Archuleta, K. L., Spann, S. M., & Dale, A. K. (September 2011). *Understanding financial mental health: Exploring predictors of financial Anxiety*. Research paper presentation at the annual conference of the Financial Therapy Association, Athens, GA.
- Bell, M., Archuleta, K. L., Ford, M. R., Ingram, J., Irwin, L., Grable, J. E., & Boyle, J. (September 2011). *Developing a solution-focused approach to financial well-being*. Presentation at the annual conference of the Financial Therapy Association, Athens, GA.
- Archuleta, K. L., Britt, S. L., & Nazarinia-Roy, R. R. (September 2011). *What is theory? Moving financial therapy forward through theory*. Presentation at annual conference the Financial Therapy Association, Athens, GA.
- Cumbie, J., Cupples, S., Henegar, J., Schindler, K., Archuleta, K. L., Britt, S. L., & Grable, J.E. (April 2011). *Student financial counseling: A study of clinical and non-clinical sample*. Research paper presented at the annual conference of the American Council on Consumer Interests, Washington, D.C.
- Archuleta, K. L., Jurich, A. P., Grable, J. E., & Russell, C. R. (September 2010). *Dyadic processes influencing household financial management*. Poster presented at the annual conference of the Financial Therapy Association, Manhattan, KS.
- Grable, J.E., Archuleta, K. L., & Webb, F. (September 2010). *Risk and credit payment behavior*. Poster presented at the annual conference of the Financial Therapy Association, Manhattan, KS.
- Grable, J. E., Sages, R. A., Webb, F., Schindler, K., & Archuleta, K. L. (April 2010). *Breaking the circle of problematic financial behavior: A test of self-esteem theory*. Research paper presented at the annual conference of the American Council on Council Interests, Atlanta, GA.
- Archuleta, K. L., Grable, J. E., & Britt, S. L. (March 2010). *Shared goals and values: Towards an understanding of financial and marital satisfaction*. Research paper presented at the annual conference of the Eastern Family Economics and Resource Management Association, Chattanooga, TN.
- Grable, J., Archuleta, K., Webb, F., & Britt, S. (November 2009). *Gender difference in risk tolerance: Are women really different than men?* Research paper presented at the annual conference of the Association of Financial Counseling and Planning Education, Scottsdale, AZ.
- Grable, J., Archuleta, K., & Webb, F. (November 2009). *Risk and credit payment behavior*. Poster presented at the annual conference of the Association of Financial Counseling and Planning Education, Scottsdale, AZ.

- Archuleta, K. L. (November 2009). *Dyadic processes influencing household financial management*. In K. Campbell (Chair), *Predicting Relationship Outcomes from Shared and Realistic Couple Expectations*. Symposium presented at the National Council of Family Relations, San Francisco, CA.
- Archuleta, K. L., Jurich, A. P., Grable, J.E., & Russell, C. R. (October 2009). *Dyadic processes influencing household financial management*. Poster presented at the American Association for Marriage and Family Therapy.
- 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.
- Archuleta, K. L., & Tonn, T. J. (November 2007). *The use of financial satisfaction and financial stressors to predict marital stability*. Paper presented at the annual conference of the National Council on Family Relations, Pittsburgh, PA.
- Archuleta, K.L. & Griffin, C. (August 2007). *Support systems for farm women*. Presentation at the annual conference of the National Association for Rural Mental Health, Kansas City, MO.
- Archuleta, K.L. & Tonn, T.J. (November 2006). *Testing the effectiveness of using financial satisfaction and stressors to predict marital stability*. Presentation at the annual conference of the Association of Financial Counseling and Planning Education, San Antonio, TX.
- Archuleta, K.L., & Russell, C.S. (October 2006). *Family business & marital quality: An example from the farm*. Poster presented at the annual conference of the American Association for Marriage and Family Therapy (AAMFT), Austin, TX.
- Archuleta, K.L., & Griffin, C. (August 2006). *Farming with family: Managing for success*. Presentation at the annual conference of the National Association for Rural Mental Health, San Antonio, TX.
- Nelson Goff, B. S., Schwerdtfeger, K., Joy, A., Smith, D. B., Archuleta, K. L., Henry, S. B., Osby, J., Hayes, E., Hoheisel, C. B., Bateman, L., Bole, A., Burks, T., Nye, B., Scheer, T., & Sanders, E. (October 2005). *Trauma in couples: Intrapersonal and relational dynamics*. Poster presented at the annual conference of the American Association for Marriage and Family Therapy, Atlanta, GA.
- Nelson Goff, B.S., Hoheisel, C.B., Archuleta, K.L., Smith D.B., Schwerdtfeger, K.L., & Kelley, S.M. (October 2003). *Clinical application and integration of family systems theory to trauma*. Presentation at the annual conference of the International Society for Traumatic Stress Studies, Chicago, IL.
- Schwerdtfeger, K.L., Jones, N.N., Nelson Goff, B.S., Hoheisel, C.B., Smith D.B., Archuleta, K.L., Blalock Henry, S., Joy, A., Krug, S., Tompkins, A., Bateman, L., Peterson, R., & Kelley, S.M. (October 2003). *Trauma in couples: Relationship fragmentation and integration*. Poster presented at the annual conference of the International Society for Traumatic Stress Studies, Chicago, IL.
- Nelson Goff, B.S., Schwerdtfeger, K.L., Jones, N.N., Hoheisel, C.B., Smith D.B., Archuleta, K.L., Peterson, R., & Kelley, S.M. (October 2003). *The TRECK Team: Trauma Research, Education,*

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

National Invited Presentations

Bell, M. (Presenter), & Archuleta, K. L. (Lead Researcher). (February 2012). *A new way of communicating with your financial planning clients: Using a Solution-Focused Approach.* Invited presentation to Texas Tech University Opportunity Days, Lubbock, TX.

Devaney, S., Sharpe, D., O'Neill, B., Lawrence, F., & Archuleta, K. (November 2010). *Getting published.* Invited panel member at the annual conference of the Association of Financial Counseling and Planning Education Conference, Denver, CO.

Archuleta, K. L., Coffman, B., Ford, M. R., & Olsen, C. S. (October 2010). *Determinants of farm women's business satisfaction: An exploratory study.* Invited presentation at the annual meeting of the North Central Regional Association - NCCC052 Family Economics, Omaha, NE.

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.

Grable, J. E., Rotfield, H., Lawrence, F., Devaney, F., Xiao, J., & Archuleta, K. L. (April 2010). *Getting published.* Invited panel member at the annual conference of the American Council on Consumer Interests, Atlanta, GA.

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., & Bell, M. (February 2012). *Developing a Solution-Focused approach to financial well-being: A new way of thinking.* Invited presentation to Kansas State University Foundation's Insurance and Financial Advisors Continuing Education (IFACE) conference, Manhattan, KS.

Archuleta, K. L., & Olsen, C. S. (February 2012). *Money matters: Promoting financial and relational well-being.* Invited presentation at the annual Women Managing the Farm conference, Wichita, 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.

- Archuleta, K. L., Gould, T., & Steffensmeier, T. (October 2011). *Why choose open access?* Invited panel member at the K-State Libraries Open Access Week, 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., & Ingram, J. A. (February 2011). *Financing your lifestyle happily ever after*. Invited presentation at the Building an Army Strong Marriage Seminar, Ft. Riley, 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. (January 2010). *Financing your lifestyle happily ever after*. Invited presentation at the Building an Army Strong Marriage Seminar, Ft. Riley, KS.
- Archuleta, K. L. (October 2009). *Money and Relationships: A review of research and best practices*. Invited presentation to the Annual Kansas State Research and Extension conference, Manhattan, KS.
- Archuleta, K. L. (September 2009). *Financing your lifestyle happily ever after*. Invited presentation given to Ft. Riley personnel sponsored by Ft. Riley K-State Research and Extension, Ft. Riley, KS.
- Archuleta, K.L. (July 2009). *Mediation and finances: What you need to know*. Guest Lecturer in FSHS 535: Divorce and Child Custody Mediation, Manhattan, KS.
- Archuleta, K. L. (May 2009). *Maximize your potential*. Commencement Speaker at Burlington High School Graduation, Burlington, OK.
- 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). *Financing your life: Family style*. Invited presentation to Head Start families, Manhattan, 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 FSHS 105: Introduction to Personal Family Finance. Kansas State University, Manhattan, KS.
- Archuleta, K. L. (August 2007). *Financing your lifestyle*. Invited workshop presented at the Catholic Charities Marriage for Keeps program, Manhattan, KS.
- Archuleta, K. L. & Thomas, W. (July 2007). *Financing your lifestyle*. Workshop presented for Ft. Riley

soldiers, Manhattan, KS.

Archuleta, K. L. (April 2006). *Financing your lifestyle*. Workshop presented for Kansas Children's League Service League, Topeka, KS.

Archuleta, K. L., & Osborn, T. (March 2006). *Setting rules for adolescents*. Workshop presented for Kansas Children's Services League, Salina, KS.

Archuleta, K. L. (March 2006). *Financial tools for helping professional 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., & Sandmann, M. (August 2004) *Advising farm families*. Workshop presented to farm family advisors funded by the Risk Management Agency, Topeka and Salina, 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., Blalock Henry, S., Jeanfreau, M. M., & Bean, M. (February 2004, August 2003, Spring 2006). *Eating disorders*. Workshops presented for Kansas Children's League Services, Topeka and Manhattan, KS.

Maddux, E. M., & Archuleta, K. L. (January 2004). *Financial tools*. Presentations at the Brain Injury Support Group, Manhattan, KS, and to Ellsworth County Extension Services, Ellsworth, KS.

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

Archuleta, K. L. (June 2003). *Religious effects on adolescent sexuality*. Invited workshop at the Driftwood Christian Church high school youth group, Cherokee, OK.

Nelson, B., Archuleta, K. L., Hoheisel, C., & Kelly, S. (April 2003, July 2003). *Post traumatic stress disorder: Beyond the basics*. Workshops presented for Kansas Children's Service League, Salina and Marysville, KS.

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 "K-State faculty, graduate students contribute to latest issue of the Journal of Financial Therapy." K-State Media Relations Release, January 18, 2012.
- PFP Program featured in "Financial planning education 101: 10 standout schools" *Financial Planning*, November 1, 2011.
- 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 "Managing money is a family affair," by Eileen A. J. Connelly – Associated Press, *San Antonio Express*, February 22, 2011.
- Interviewed in "Family Finance: Little lies could mean big trouble," by Eileen A. J. Connelly – Associated Press, *Lubbock Online*, February 19, 2011
- Interviewed in "Students needed for financial counseling project," by Jane Marshall, Kansas State University News Services Communications and Marketing, October 15, 2010.
- Interviewed for "Why the recession is hitting men harder," *Parade*, April 11, 2010.
- Featured in "Three K-State Institute of Personal Financial Planning Faculty members serving on first board of directors of the Financial Therapy Association, K-State Media Relations Release, March 2, 2010.
- Interviewed in "For some women who earn more than their husbands, more money means more marital problems," by Rosemary Black, *NY Daily News*, Feb. 12, 2010.
- Interviewed in "10 Ways to Stop Fighting about Money," by Katie McColl, *CBS Money Watch*, Feb. 11, 2010.
- Interviewed in "Love and Money: He Spends, She Saves, They Fight," by Katie McColl, *CBS Money Watch*, Feb. 11, 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 in "Financial therapy blends mental health, money help," by Heather Hollingsworth, Associated Press, Kansas City, December 6, 2009. Seen in *businessweek.com*, *chicagotribune.com*, *forbes.com*, *onenewsnow.com*, *usatoday.net* and others.
- Interviewed for Debt Free U, November 23, 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.

Interviewed in “The Right Way to Argue About Money,” Kristen Gough. July 24, 2009. *FiLife.com* in partnership with *The Wall Street Journal*.

Interviewed in “Experts recommend phone interviews and checking of credit and references before selection,” Su Bacon. *Kansas City Star*, July 11, 2009.

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.

Featured in “Kristy (Pederson) Archuleta to speak at Burlington’s Graduation,” Yvonne Miller. *Alva Review Courier/Newsgram*, May 14, 2009

Interviewed in “With this \$19.95 ring, I thee wed a spendthrift,” J. Braly. <http://blog.oregonlive.com>, April 18, 2009.

Quoted in “Hutchinson Event Will Explore Women’s Roles in Agriculture,” Rick Plumlee, *The Wichita Eagle*, February 12, 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 “So You Married a Spender,” Shelly K. Schwartz, *CNBC.com*, February 6, 2009, <http://www.cnbc.com/id/28872838>.

Quoted in “Last Call for Women in Ag Conference,” *US Ag Network*, February, 5, 2009. <http://www.usagnet.com>.

Featured in “BHS Grad Earns Doctorate, Using Rural Background to Help Others,” Yvonne Miller, *Alva Review Courier/Newsgram*, January 21, 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.

Interviewed about Institute of Personal Financial Planning Clinic, KMAN radio with Scott Miller Manhattan, KS, December, 2008.

Quoted in “Financial Therapy Clinic, To be opened by K-State’s Institute of Personal Financial Planning in Manhattan, First of its Kind,” K-State Media News Release. November 24, 2008.

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

Quoted in “Financial Planning Team Helps Families Cope in Hard Times,” K-State Media News Release, November 18th, 2008.

Quoted in “K-State’s Institute of Personal Financial Planning Exploring New Methods to Help Families Cope in Economic Hard Times,” K-State Media News Release, November 10, 2008.

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

Featured in “Kansas State University Trains Financial Planners” (October 12, 2008) in *InvestmentNews*.

Featured in *Financial Planning Times*, (3) p. 1, (October, 2008).

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.

Quoted in "Role of Women Gets New Focus" as published in the *Kansas City Star*. January 16, 2007.

Quoted in *More Women Making Farming a Way of Life* as published in the Garden City Telegram. November 25, 2006.

International Activities

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

National Activities

- Discussant, '*Money Matters*' in *Families*. Theory Construction and Research Methodology Session. National Council on Family Relations Pre-conference, Orlando, FL, November, 2011
- 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
- Guide for Personal Success (GPS), K-State Office of Student Activities, 2009-2010. Note: Invited to participate in pilot program, 2009-2010.
- 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

- Outstanding Research Paper, Financial Therapy Association Conference, 2012
- 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

Botz, Daniel, Social Security's Impact on Women Presented at Annual MBAA International meeting, March 28-30, 2012.

Botz, Daniel, Understanding Social Security Presented at the Western Kansas Council on Estate Planning & Giving, November 10, 2011 and at the Women of K-State November 17, 2011 meeting.

Botz, Daniel, Do Blondes Really Have More Fun? Presented at Annual MBAA International meeting, March 23-25, 2011.

Botz, Daniel, Private Colleges and the Entwinement Theory: Brentwood Academy's Impact. Presented at Annual MBAA International meeting, March 26, 2010.

Botz, Daniel, Covenants Not to Compete in Short-Term Employment Contracts: A Teaching Example. Presented at Annual MBAA International meeting, March 18-20, 2009.

Botz, Daniel, Merchantability or Strict Liability: Which Cause of Action Makes Sense?
Presented at Annual MBAA International meeting, April 2-4, 2008.

Botz, Daniel, Merchantability: The High Plains Presented at Annual MBAA International meeting, March 28-30, 2007.

Botz, Daniel, Magnuson-Moss and Merchantability. Presented at Annual Midwest Business Administration Association meeting, March 17-18, 2005.

Botz, Daniel, Protecting Merchantability: A Case And Statutory Comparison. Presented at Annual Midwest Business Administration Association meeting, March 18-19, 2004.

Botz, Daniel (2003) Adult Professional Studies Portfolio in Financial Accounting. Accelerated degree completion program professional course supplement, Kansas Wesleyan University.

Botz, Daniel (2002) Adult Professional Studies Portfolio in Business Economics. Accelerated degree completion program professional course supplement, Kansas Wesleyan University.

Botz, Daniel (2001) Adult Professional Studies Portfolio in Business Law. Accelerated degree completion program professional course supplement, Kansas Wesleyan University.

Teaching Experience

2011-present Kansas State University – Salina
Assistant Professor of Personal Financial Planning
Courses taught in Salina campus Personal Financial Planning program: Family and Personal Finance, Family and Consumer Economics, Retirement Planning, Insurance Planning, Financial Counseling, Investing, and Estate Planning

2000 – 2011 Kansas Wesleyan University
Associate Professor of Business and Accounting
Courses taught in the undergraduate, masters and adult professional studies program: Personal Finance, Individual Income Tax, Microeconomics, Macroeconomics, Business Law, Sports Law, Intellectual Property Law, Legal Environment of Business, Employment Law, Introduction to Business, Cost Accounting, Strategic Management, Human Resource Management, Quantitative Business Applications, International Business, and Financial 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.
- 1998-1999 Blackwell, Blackwell & Struble
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. 1974	University of Missouri–Columbia Vocational Home Economics Education
M.S. 1980	University of Arkansas Operations Management
Ph.D. 1988	University of Missouri–Columbia 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
- 1975-80 Customer Service Representative, Arkansas-Missouri Power 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
Lowther Intermediate School Site Council, 2003-2006
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

GIS Technology: A New Approach to Modeling Rural Retail Trade Area Capture. Co-principal investigators: B. Minshall, H.L. Seyler, L.A. Coulson, B. Johnson. North Central Regional Center for Rural Development, 1993-94. \$15,645.

Developing a Standard of Need for the State of Kansas. Co-principal investigators: J. Gibbons, L. Bloomquist, B. Bratsberg, B. Cauble, A. Coulson, J.

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

Personal Financial Planning Graduate Certificate Program. Co-principal
investigators: A. Coulson, J. Grable, R. Sages. Kansas State University Division
of Continuing Education, 2011-2012, \$19,500.

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: *Home Economics Research Journal*, 1990-93

Reviewer: ACCI Annual Conferences, 1992-93, 1994

Reviewer: AFCPE Annual Conferences, 1992, 1994

Reviewer: Special issue of the *Journal of Family and Economic Issues*,
Volume 14, Number 3, Fall 1993.

Reviewer: *Family Economics Review*, 1994.

Ex-Officio Committee Member, Kansas Supreme Court Child Support
Guidelines Committee, 1989-90, 1993-94.

Principal Investigator: Transfer Payments and Rural Community
Economic Well-Being. Kansas Center for Rural Initiatives, 1990.

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

Rural Retail Trade Area Capture. North Central Regional Center for Rural Development, 1993-94.

Co-principal investigator: Developing a Standard of Need for the State of Kansas. Kansas Department of Social and Rehabilitation Services, 1995-96.

Papers

Coulson, L.A., and Darling, D.L. (1996) Coping Strategies of Successful Rural Communities. Report of Progress No. 754. Kansas Agricultural Experiment Station. Kansas State University.

Franke, J. and Coulson, A. (1994) Kansas Poll–1994. Institute for Social and Behavioral Research and Department of Human Development and Family Studies. Kansas State University.

Coulson, L.A. (1994) Economic Well-Being of Rural Baby Boomers. *Proceedings of the 40th Annual Conference of the American Council on Consumer Interests*, Minneapolis, Minnesota.

Coulson, L.A. (1994) Labor Market Participation and Earnings by Female Members of the Baby Boom Generation. *Home Economics Research Journal*, 22(4): 441-459.

Chang, L-W., Schumm, W.R., Coulson, L.A., Bollman, S.R., and Jurich, A.P. (1994) Dimensionality of Brief Family Interaction and Satisfaction Scales Among Couples from Eight Western and Midwestern States. *Psychological Reports*, 74: 131-144.

Coulson, L.A., Peterson, L.R., and Murray, J.P. (1992) The 1992 Future of Kansas Survey. Human Development and Family Studies, Kansas State University, Manhattan, KS.

Coulson, L.A., Peterson, L.R., Chang, L-W., and Murray, J.P. (1991) The 1991 Future of Kansas Survey. Human Development and Family Studies, Kansas State University, Manhattan, KS.

Coulson, L.A. (1990) Female Baby Boomers–Savings Over Time. *Proceedings of the American Council on Consumer Interests*, New Orleans, LA: 316-321.

Peterson, L.R., Chang, L-W., Coulson, L.A., Murray, J.P., and Poresky, R.H. (1990) Perceptions and Expectations: A Study of Life Quality in Kansas. Human Development and Family Studies, Kansas State University, Manhattan, KS.

Peterson, L.R., Chang, L-W., Coulson, L.A., Bollman, S.R. Jurich, A.P., and Schumm, W.R. (1990) Economic and Emotional Well-Being of Rural Families in Kansas. Report of Progress, Kansas Agricultural Experiment Station, Kansas State University, Manhattan,

KS.

Presentations

Coulson, A., Chamley, M., and Koff, D. (July 2005) Financial Planning and Debt Management for Graduate/Professional Students: Helping Your Students Meet Their Financial Goals. National Association of Student Financial Aid Advisors Annual Meeting. New York, NY.

Coulson, A., Chamley, M., and Koff, D. (July 2004) The Need for Financial Planning Strategies for Students. National Association of Student Financial Aid Advisors Annual Meeting. Minneapolis, MN.

Coulson, L.A. (April 1995) Retirement Planning Issues for Women. Kansas Association of Family and Consumer Sciences Annual Meeting. Manhattan, KS.

Garasky, S., Fletcher, C.N., Weagley, R.O., and Coulson, L.A. (March 1995) The Role of Family Economics Research in Developing State Policy. American Council on Consumer Interests Annual Conference. Washington, D.C.

Coulson, L.A., Jones, J.E., and Peterson, C.S. (September 1994) Working with Adults with Financial Problems. Fourteenth Annual National Rural Families Conference. Manhattan, KS.

Coulson, L.A. (June 1994) Derivation of the 1994 Child Support Tables and Cost of Living Differentials. Joint Meeting of the Kansas Bar Association and the Kansas Judiciary. Overland Park, KS.

Coulson, L.A. (March 1994) Derivation of the 1994 Child Support Tables. Kansas Supreme Court. Topeka, KS.

Coulson, L.A. (March 1994) Economic Well-Being of Rural Baby Boomers. American Council on Consumer Interests Annual Conference. Minneapolis, MN.

Coulson, L.A. (April 1992) The 1992 CATI Survey of Households in Kansas. Kansas Center for Rural Initiatives. Manhattan, KS.

Coulson, L.A., Jurich, A.P., Bollman, S.R., and Schumm, W.R. (November 1991) Interpersonal Relationships: Are There Differences for the Rural Poor and Non-Poor? National Council on Family Relations Annual Conference. Denver, CO.

Coulson, L.A. (July 1991) Kansas Child Support Guidelines. Kansas Child Support Enforcement Association. Manhattan, KS.

- Coulson, A., Bollman, S., Jurich, A., Schumm, W., and Poresky, R. (April 1991) Social Science Research with Families in Kansas. Kansas Agricultural Experiment Station–Cooperative Extension Service Annual Conference. Manhattan, KS.
- Coulson, L.A. (October 1990) Transfer Payments and Rural Community Economic Well-Being. Kansas Center for Rural Initiatives. Manhattan, KS.
- Peterson, L., Chang, L-W., Coulson, A., Poresky, R., and Bollman, S. (September 1990) Perceptions and Expectations: A Study of Quality of Life in Kansas. Working with Families Conference. Manhattan, KS.
- Coulson, L.A. (September 1990) A CATI Survey of Households in Kansas. Kansas Center for Rural Initiatives. Manhattan, KS.
- Coulson, L.A. (April 1990) Child Support Guidelines Revisited Again. Kansas Bar Association. Topeka, KS.
- Coulson, L.A. (March 1990) Female Baby Boomers–Savings Over Time. American Council on Consumer Interests Annual Conference. New Orleans, LA.
- Coulson, L.A. (November 1989) Derivation of Kansas Child Support Guidelines. Kansas Supreme Court. Topeka, KS.
- Coulson, L.A. (November 1989) Rural Health Care for Families. Working with Families Conference. Manhattan, KS.
- Coulson, L.A. and Dillard, B.L. (June 1986) Seminar on Personal Finance. Northeast Missouri State University. Kirksville, MO.
- Tatum, L.A. (April 1986) Human Capital Investments by Women. Midwest Region Graduate Student Symposium. Columbia, MO.
- Tatum, L.A. (February 1986) Life Insurance Planning Using Microcomputers. University of Missouri Agricultural Computer Users Group. Columbia, MO.
- Tatum, L.A. (May 1984) Advertising and the Consumer. Stephens College. Columbia, MO.

Consulting

Kansas Child Support Guidelines. (1989-1996)

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

Balanced Farming and Family Living Program. (1991)

CURRICULUM VITAE
Maurice MacDonald
May 2012

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.
University of Michigan, Economics Ph.D. 1974.
(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, GPIDEA 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

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

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

Member, Rural Policy Research Institute Rural Welfare Reform Panel, 1997-1998.

Academic Advisory Board, The Rockford Institute Center on the Family in America, 1987-96.

Editorial Board for *Journal of Family and Economic Issues* 1987-1992.

Institute for Research on Poverty Small Grant Proposal Review Panel 1988-1996.

Proposal Reviewer, National Institute of Health, Center for Population Research 1980-1982.

Referee for *International Journal of Aging and Human Development*, *Journal of Family and Economic Issues*, *Family and Consumer Sciences Research Journal*, *Aging & Mental Health*, *The Gerontologist*, *Journal of Aging Research*, *Association of Financial Counseling and Planning Educators*, *Demography*, *Social Service Review*, *American Economic Review*, *Journal of Human Resources Journal of Consumer Affairs*, *Journal of Policy Analysis and Management*, *Journal of Public Economics*, *Policy Studies Review*

Survey Research Management

1991-95 Co-Investigator, Wisconsin Longitudinal Study of Aging and Health Center for Demography and Ecology, U.W. Madison

1983-95 Co-Investigator, National Survey of Families and Households: The Health and Well-Being of Families in Transition Center for Demography and Ecology, U.W. Madison

1986-89 Director of Parent Surveys for the Institute for Research on Poverty Child Support Reform Project

1985-86 Director of Children, Incomes, and Program Participation Survey for the Wisconsin Office of Child Support Enforcement

1983-85 Director, Basic Economic Needs Assessment Study for the Wisconsin Department of Health and Social Services

Consultant

Research Consultant, International Foundation of Employee Benefit Plans, 2008.

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

Wisconsin Legislative Council Special Committee on Child Custody, Child Support, and Visitation Laws, 1994.

Social Science Research Council Collaborative Research Project on the Survey of Incomes and Program Participation, 1984-1985.

Madison, WI. School Board, on Cost-of-Living Increases for Arbitration Hearings, 1983-85.

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

Mathematica Policy Research, Washington, D.C., 1980-1985.

Maurice MacDonald

Office of Analysis and Evaluation, Food and Nutrition Service, USDA, 1978-80.

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.

U.S. Interagency Task Force on Poverty Definitions, 1975.

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*.

Martin, P., Jazwinski, S.M., Davey, A., MacDonald, M., Margrett, J., Siegler, I., Arnold, J., Woodard, J., Johnson, M.A., Kim, S., Dai, J., Li, L., Batzer, M., & Poon, L.W. APOE ϵ 4, life experiences, and affect among centenarians. Submitted to *Journal of Gerontology: Psychological Sciences* (June, 2011).

PUBLICATIONS AND RESEARCH REPORTSBook

MacDonald, Maurice. Food, Stamps, and Income Maintenance, 1977, New York: Academic Press.

Articles, Book Chapters, and Book Reviews

Cho, J., Martin, P., Margrett, J., MacDonald, M., Poon, L. W. , and Johnson, M.A. (2012) Cohort comparisons in resources and functioning among centenarians: Findings from the Georgia Centenarian Study. *International Journal of Behavioral Development*. DOI: 10.1177/0165025412439967. ijbd.sagepub.com

Bishop, A.J., Martin, P., Randall, G.K.I, MacDonald, M., & Poon, L. (2012). Exploring life satisfaction in exceptional old age: The mediating role of positive and negative affect. *Clinical Gerontologist*. 35:105-125. DOI: 10.1080/07317115.2022.646389.

MacDonald, M., and Cho, Jinmyoung. (2011) Impact of Resources on Successful Adaptation Among the Oldest Old. In L. Poon and J. Cohen-Mansfield (Eds.) Understanding the Well-Being of the Oldest Old Cambridge University Press.

Cho, J., Martin, P., MacDonald, M., Margrett, J., and Poon, L.W. (2011). Multidimensional predictors of fatigue among octogenarians and centenarians. *Gerontology*. (DOI: 10.1159/00332214).

Hensley, B., Martin, P., Margrett, J., MacDonald, M., Siegler, I., & Poon, L. W. (2011) Life events and personality influencing loneliness among centenarians. *The Journal of Psychology*. 146:1-2, 178-188.

Maurice MacDonald

5

Martin, P., MacDonald, M., Margrett, J., Siegler, I., & Poon, L.W. Correlates of functional capacity among centenarians. (2011) *Journal of Applied Gerontology*. XX(X), 1-22 DOI: 10.1177/0733464811520563.

G. Kevin Randall, Peter Martin, Maurice MacDonald, Jennifer Margrett, Alex Bishop and Leonard W. Poon. Comparing the support-efficacy model among centenarians living in private homes, assisted living facilities, and nursing homes. *Journal of Aging Research* Volume 2011, Article ID 280727, 10 pages doi: 10.4061/2011/280727.

Cho, J., Martin, P., Margrett, J., MacDonald, M. and Poon, L.W. The relationship between physical health and psychological well-being among oldest-old adults. *Journal of Aging Research* Volume 2011, Article ID 605041, 8 pages doi: 10.4061/2011/605041.

Margrett, J., Daugherty, K., Martin, P., MacDonald, M., Davey, A., Woodard, J., Miller, L., Siegler, I., & Poon L., (2011). Affect and loneliness among centenarians and the oldest old: The role of individual and social resources. *Aging and Mental Health*. 15 (3), 385-396.

Sabri, M., MacDonald, M., Masud, J., & Cook, C. Knowledge and skills of financial at risk young adults in Malaysia. (2010) *Proceedings of the Association for Financial Counseling and Planning Education*. (Susan J. Eitel, Editor) November.

Sabri, M., & MacDonald, M. (2010). Savings behavior and financial problems among college students: The role of financial literacy in Malaysia. *Cross-cultural Communication*. 6 (5), 103-110.

Poon, L.W., Martin, P., Bishop, A., Cho, J., daRosa, G., Deshpande, N., Hensley, R., MacDonald, M., Margrett, J., & Randall, G. (2010). Understanding Centenarians' Psychosocial Dynamics and Their Contributions to Health and Quality of Life. *Current Gerontology and Geriatrics Research*. Volume 2010, Article ID 680657, 13 pages doi:10.1155/2010/680657.

Arnold, J., Dai, J., Nahapetyan, L., Arte, A., Johnson, M.A., Hausman, D., Rogers, W., Hensley, R., Martin, P., MacDonald, M., Davey, A., Siegler, I., Jazwinski, M., & Poon, L. (2010). Predicting successful Aging in a Population-based Sample of Georgia Centenarians. *Current Gerontology and Geriatrics Research*. Volume 2010, Article ID 989315, 9 pages doi:10.1155/2010/989315.

Sabri, M.F., MacDonald, M., Hira, T. & Masud, J. (2010) Childhood Consumer Experience and the Financial Literacy of College Students in Malaysia. Family and Consumer Sciences Research Journal, 38 (4), 455-467.

Martin, P., Poon, L.W., MacDonald, M., & Margrett, J. (2010) Resiliency and Longevity: Expert Survivorship of Centenarians. In P. Frey and C. Keyes (Eds) New Frontiers in Resilient Aging: Life Strengths and Wellness in Late Life. Cambridge University Press.

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Maurice MacDonald

6

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7

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9

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Maurice MacDonald

11

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PRESENTATIONS

Refereed 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 Fazli Sabri, Jariah Masud, and Christine C. Cook) Denver, CO. November 2010.

Gerontological Society of America, "Comparison of Heidelberg and Georgia Centenarians on Various Dimensions" (with Wen-Hua Hsieh, Peter Martin, and Leonard Poon) New Orleans, LA. November 2010.

Gerontological Society of America, "Cohort Differences in Resources and Functioning among Centenarians", (with Jinmyoung Cho, Peter Martin, Jennifer Margrett, and Leonard Poon) New Orleans, LA. November 2010.

Gerontological Society of America, "Life Events, Personality, and Loneliness: Findings from the Georgia Centenarian Study" (with Robert Hensley, Peter Martin, and Leonard Poon) New Orleans, LA. November 2010.

Gerontological Society of America, "Convoys in Very Late Life" (with G. Kevin Randall, Peter Martin, and Jennifer Margrett) Atlanta, GA. November 2009.

Gerontological Society of America, "Fatigue and Functional Ability among Octogenarians and Centenarians" (with Jinmyoung Cho, Peter Martin, and Leonard Poon) Atlanta, GA. November 2009.

Gerontological Society of America, "Cognitive Resilience and Vitality among Centenarians"

Maurice MacDonald

12

(with Jennifer Margrett, Peter Martin, and Leonard Poon). Atlanta, GA. November 2009.

Association for Financial Planning and Counseling Education, "Evaluation of a Web-Based Personal Finance Course for College Students" (with Jeanna Hennick, and Douglas Borkowski) Anaheim, CA November 2008.

Gerontological Society of America, "Resiliency and Healthy Longevity: Expert Survivorship of Centenarians" (with Peter Martin, Jennifer Margrett, and Leonard Poon) Baltimore, MD November 2008.

Gerontological Society of America, "Relationship between Health and Psychological Well-Being: Findings from the Georgia Centenarian Study" (with Jinmyoung Cho, Peter Martin, Jennifer Margrett, and Leonard Poon). Baltimore, MD November 2008.

Gerontological Society of America, "Physical Health Disparities among Georgia Centenarians" Kwag, K., Martin, P., MacDonald, M., Margrett, J, Johnson, M.A., & Poon, L.W. Baltimore, MD November 2008.

Gerontological Society of America, "The Role of Distal and Proximal Events on Physical Health of Georgia Centenarians". Hensley, B., Martin, P., MacDonald, M. & Poon, L.W. Baltimore, MD November 2008.

Gerontological Society of America, "Cognition and Resilience among Octogenarians and Centenarians" Margrett, J., Martin, P., MacDonald, M., & Poon, L.W. Baltimore, MD November 2008.

American Council on Consumer Interests, "Financial Behavior among College Students in Malaysia: Needs for Financial Education; and Research and Education Implications" (with M. Fazli Sabri, Tahira K. Hira, Jariah Masud, Laily Paim, and M. Amim Othman), Orlando, FL July 2008.

"Impact of Resources on Successful Adaptation Among the Oldest Old", U.S.-Israel Binational Science Foundation Conference on Adding Life to Years : Development of Sociological and Psychological Theories via U.S.-Israel Research. Tel Aviv, Israel. January 2008.

National Council of Family Relations, "Family Business: Vulnerabilities for Dual Role and Single Role Managers" (with An-Ti Shih and Linda Niehm) Pittsburgh, November 2007.

Gerontological Society of America "Centenarians' Resources, Economic Dependency and Mental Well-Being". San Francisco, CA November 2007.

Baenziger, J., Martin, P., MacDonald, M., & Poon, L. W. (2007, November). *Age and residence differences in mental status: Comparison of three mental status assessments*. Presented at the Annual Meeting of the Gerontological Society of America, San Francisco, CA.

Bishop, A., Martin, P., MacDonald, M., & Poon, L. W. (2007, November). *Predicting happiness among centenarians*. Presented at the Annual Meeting of the Gerontological Society of America, San Francisco, CA.

Da Rosa, G., Martin, P., MacDonald, M., & Poon, L. W. (2007, November). *Age and residence differences in resources and mental health*. Presented at the Annual Meeting of the Gerontological Society of America, San Francisco, CA.

Hensley, R., Martin, P., MacDonald, M., & Poon, L. W. (2007, November). *Family history and critical outcomes*. Presented at the Annual Meeting of the Gerontological Society of America, San Francisco, CA

Randall, K., Martin, P., MacDonald, M., & Poon, L. W. (2007, November). *Social resources and longevity*. Presented at the Annual Meeting of the Gerontological Society of America, San Francisco, CA.

Margrett, J., Martin, P., Woodard, J., Miller, S., MacDonald, M., Baenziger, J., Siegler, I., & Poon, L. W. (2007, November). *Mental health of centenarians and the oldest old: Contributions of cognition and personality*. Presented at the Annual Meeting of the Gerontological Society of America, San Francisco, CA.

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.

National Council of Family Relations, "Effects of Family Boundary Regulations on Adolescents' Academic Performance", Minneapolis, MN November 2006.

Gerontology Society of America, "Life Events, Personality, and Economic Resource Predictors of Older Adults' Economic Dependency" Dallas, TX November 2006.

Gerontology Society of America, "Resource Deficits and Functional Capacity among the Oldest Old" Dallas, TX November 2006.

Gerontology Society of America, "Economic Resources and Economic Support Burden in Very Old Adults" Orlando, FL November 2005.

Population Association of America, "Understanding Multiple, Interdependent Resource Transfers to Elderly Parents" Minneapolis, MN May 2003.

Carework Network Conference, (American Sociological Association Pre-Conference) "Financial Reciprocity and Elder Care" Chicago, IL August 2002.

Population Association of America, "Inter-Family Financial Transfers from Parents to Mid-Life Adults and their Sibs" San Francisco, CA April 1995.

Fourth Annual Quality-of-Life/Marketing Conference, "Toward Consumer Well-Being: Consumer Socialization Effects of Work Experience" Washington, D.C. November 1992.

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.

Population Association of America, "Impact of Immediate Withholding of Child Support Payments on the Labor Supply of Wisconsin Noncustodial Parents", Toronto, May 1990.

American Council of Consumer Interests, "Child Support Reform and Noncustodial's Labor Supply", New Orleans, March 1990.

American Council of Consumer Interests, "Relationship Between Perceived Life Satisfaction and Measures of Economic Well-Being", New Orleans, March 1990.

Quality-of-Life Studies in Marketing and Management Conference, "Subjective Well-Being and the Relative Income Hypothesis", Blacksburg VA, November 1989.

American Council of Consumer Interests, "Child Support Reform and Children's Poverty" April 1988.

Population Association of America, "Earnings and Fertility: Techniques for Longitudinal Analysis", March 1981.

National Conference on Social Welfare, Philadelphia, "Collecting Child Support for AFDC Mothers", May 1979.

American Agricultural Economics Association, Blacksburg, VA, "The Food Stamp Program and Welfare Reform", August 1978.

Population Association of America, Atlanta, GA, "The Earnings of Men and Marital Disruption", April 1978.

Econometrics Section, American Economic Association Meetings, New York, N.Y., "The Impact of Wage Subsidies on Employment in State and Local Government", December 1977.

American Sociological Association, New York, N.Y., "Relative Economic Status and Fertility: Evidence from a Cross Section", August 1976.

Invited Research

International Consortium of Centenarian Studies "Data Quality of Self and Proxy Reports in Centenarian Studies" (Peter Martin, Jinmyoung Cho, and Maurice MacDonald) Paris, France July 2009.

University of North Texas, Department of Educational Psychology, "Distal Influences of Education and Engaged Lifestyle on Well-Being of the Oldest-Old". February, 2009.

Participant for Consumer Socialization, U.S. Department of Treasury and U.S.D.A. Research Symposium on Financial Literacy and Education. Washington, D.C. October 2008.

"Social and Personal Asset Influences on Economic Dependency and Mental Health of the Oldest Old" 20th Anniversary Conference for the Georgia Centenarian Study, Atlanta August, 2008.

"Economic Resources and Support Burden for Very Old Adults", Annual Meeting of the Centenarians Program Project for the National Institute on Aging, Atlanta, January 2006.

Keynote Speaker, University of Minnesota Family Policy Forum, "The State of Family Policy at Century's Turn", St. Paul, September 2000.

National Coalition Against Legalized Gambling Midwest Conference "Gambling and the Family: Iowans' Knowledge and Attitudes" Des Moines, May 1998.

U.W.-Madison Center for Demography and Ecology "Design Issues for Phase III of the National Survey of Families and Households" April 1997.

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

Iowa Section of National Extension Association of Family and Consumer Sciences, "Research on Intra-Family Financial Exchange", Ames, April 1996.

U.S. Department of Agriculture Food and Consumer Services, Poverty Research Seminar, "New Survey Methods for Measuring Food Security", Washington, D.C. May 1995.

U.S. Department of Health and Human Services IRP-ASPE Poverty Research Seminar Series, discussant for session topics on child nutrition, child support, and wages of low-skilled workers Washington, D.C., May 1994.

American Council of Consumer Interests, panel discussant "Data for Family Economics Research: The National Surveys of Families and Households", for the North Central Regional Conference on Family Economics Research, Minneapolis, March 1994.

U.S. Department of Health and Human Services IRP-ASPE Poverty Research Seminar Series, discussant on "Public and Private Transfers and Poverty in Five Countries", Washington, D.C., May 1992.

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

Food and Nutrition Service, USDA "Food Stamps, Labor Supply, and Program Participation" Arlington, VA February 1991.

National Survey of Families and Households Conference on 1992 Reinterview Design, Session on "Work, Income, Assets, Debts, and Interhousehold Transfers", Madison October 1990.

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

Second International Conference on Research in the Consumer Interest, Presider/Discussant for "Enhancing Choices for Children", Snowbird, UT, August 1990.

Family Service America, Committee on Government Relations Study Panel on the Working Poor, "Food Stamp Eligibles' Benefits: Adequacy and Work Incentives", Milwaukee, February 1990.

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

Rockford Institute Conference on the Family Wage, Rockford, IL, "Assessing Trends in Family Economic Well-being", March 1988.

Rockford Institute Conference on the Free Family and the Therapeutic State, Rockford, Ill., "Understanding Biological and Economic Approaches to Marriage", October 1987.

Maurice MacDonald

16

Social Science Research Council Committee on the Survey of Income and Program Participation, Madison, "Lessons of the Wisconsin Basic Needs Study for Research on Income, Wealth, and Social Policy", November 1986.

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

University of Michigan Population Studies Center 25th Anniversary Symposium, Ann Arbor, Chair for Roundtable on "Household Structure and Composition", June 1986.

U.S.D.A. Conference on Food Stamp Research with the Survey of Income and Program Participation, Washington, D.C., "Economic Status of the Food Stamp Target Population" May 1986.

Department of Consumer Economics and Housing, Cornell University, "Family Economic Research for the Nineties", March 1986.

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

Abt Associates, Cambridge, MA "Serial Multiple Benefits and Income Adequacy", January 1985.

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.

Department of Economics, University of Notre Dame, "Evaluating Work Disincentive Effects of Reagan's Welfare Policy", October 1983.

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

Nutritional Sciences Department, University of Wisconsin-Madison, "Methodological Problems in Evaluating Nutrition Intervention", April 1983.

Office of Analysis and Evaluation, Food and Nutrition Service, USDA, "Multiple Benefits and Employment Behavior", July 1982.

National Conference on Child Support Research and Public Policy, Madison, "Child Support: Who Pays What to Whom?", April 1981.

Office of Policy, Planning, and Evaluation, Food and Nutrition Service, USDA, "Work Disincentive Effects of Multiple Program Benefits", October 1980.

North Central Regional Conference on Family Economics Research, Columbus, Ohio, "Analysis of AFDC Program Incentives for Child Support Collection", October 1979.

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

Wisconsin Center for Public Policy and Johnson Foundation Conference on the Family and Public Policy, Wingspread, Racine, WI, "Child Support from Absent Fathers", July 1978.

United States Department of Agriculture Food Policy Seminar Series, Washington, D.C., "Factors Affecting Participation in Federal Food Programs", January 1978.

Federal Council on Aging Conference on Treatment of Assets and Income from Assets in Income-Conditioned Programs, Madison, WI, "Comments on Income, Asset, and Work Tests in Transfer Programs for Able-Bodied Nonaged Individuals", May 1977.

United States Department of Agriculture Conference on Research on Domestic Food Programs, Washington, D.C. "Next Steps for Food Assistance Research", April 1977.

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.

National Advisory Committee to the Institute for Research on Poverty, Washington, D.C., "Food Stamps, Income Maintenance, and the Impact of Proposed Legislation" (Institute for Research on Poverty Discussion Paper 332-76), December 1975.

North Central Regional Conference on Family Economics Research, East Lansing, Michigan, "Nutritional Effectiveness of Food Stamps and Experimental Cash Transfers", November 1975.

Other Presentations

"Vision and Discovery for Family and Consumer Sciences Research and Graduate Education" Uneristy 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.

"Building an Outstanding College of Health and Human Sciences", University of Nevada Reno, Nevada, March 2007.

National Conference on Family Relations "Symposium on Family Policy Program Development" Irvine, CA November 1999.

Brunner Art Museum Public Lecture "Strengthening Families across the Life Span" May 1999.

ISU Hilton Chair Colloquium on Welfare Reform, "The ISU Policy Research Response" March, 1999.

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

Illinois-Springfield Institute for Public Affairs Conference on Links between Public Universities and State Capitals, "Iowa State University Experiences for Enhancing Capacity of State Government" May 1997.

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

Downtown Des Moines Rotary Club, "Overview of the CFCS Iowa Poll on Gambling and the Family" November 1996.

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

Iowa State University Department of Human Development and Family Studies, "Positioning Colleges of Family and Consumer Sciences for the Future" November 1994.

Wisconsin Center for Public Representation, "Can Regulation Provide Usable Health Insurance Information?" Madison, WI November 1994.

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

University of Wisconsin-Stout, International Year of the Family Conference, "Policies to Assist Families Meet their Income Needs", April 1994.

University of Georgia, College of Family and Consumer Sciences, "Revising Consumer Sciences for the Year 2000" Athens, May 1991.

Rockford Institute Center on Family in America Conference, "The Family and Liberty" Rockford, IL April 1990.

Madison Campus Ministry Lenten Series, "Market and Government Solutions for Poverty" Madison, WI March 1989.

Oregon State University Conference on Family Dynamics and Public Policy Keynote Address "Family Policy: Common Ground for the Common Good", Corvallis June 1988.

New College Biblical Conference on Empowering the Poor "Reforming the Welfare System" Berkeley, CA, April 1988.

FRCS Alumni Association Annual Meeting and Awards Ceremony, "Family Economics

Maurice MacDonald

19

Research and Practice for the Next Decade", May 1987.

Blessed Sacrament Parish Adult Education Program, "An Economist's Appraisal of the Bishops' Pastoral Letter on the U.S. Economy", March 1986.

Wisconsin County Welfare Directors' Association, "Eligibility and Use of Food Stamps" Rhinelander, WI, July 1976.

Milwaukee Hunger Coalition, "Food Stamps and Food Needs", April 1974.

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 Neviasser, 1984
Yoshiko Yamada, 1982
Donna Yogerst, 1985
Jana Zeidler, 1986
Molly McMahan, 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
Keiko 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 Iaquina (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 Clarridge (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 (Cruse, 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 (Cruse, 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
on The Future of Rural Aging: What It Means to Iowa , April 2005.
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.
Advisory Board, ISU Center for Family Policy, 2003-2007.
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.
Chair, Art in State Buildings Project for Palmer HDFS Building, 1995-1998.
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, Kellogg Foundation Initiative
College of Agriculture and Life Sciences, 1993-1995.
Reviewer, Vilas Associates Proposals 1992 and 1993.
University Review Committee for the Department of Continuing and Vocational
Education, 1992.
Member, U.W. Madison Graduate School Research Committee, 1988-1991.
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.
FRCS Academic Planning Council 1982-85.
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 (Enivronment, Textiles, and Design) 1986
Peg Stevenson (Child and Family Studies) 1986
Lowell Krokoff (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

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 2005

Amount: \$1.1M

Project Leader (and co-investigator with nine HDFS faculty members).

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)

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

Period: September 25, 1989 - January 31, 1991

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

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

30

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

Ph.D.	University of Georgia	Housing and Consumer Economics <i>Emphasis: Family Financial Planning</i>	2012
B.S.F.C.S	University of Georgia	Housing and Consumer Economics <i>Major: Housing</i>	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

Carswell, A. T., **Seay, M. C.**, & Polanowski, M. (in press). Reverse mortgage fraud against seniors: Recognition and education of a burgeoning problem. *Journal of Housing for the Elderly*.

Clifford (Cliff) Armstrong Robb, PhD

313 Justin Hall
Manhattan, KS 66506
cliffrobb@ksu.edu
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

Research Assistant: University of Missouri, January 2005-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)

Phi Upsilon Omicron: Honor Society (2004)

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

Publications:

- [In Press] Mansfield, P. M., Pinto, M. B., & **Robb, C. A.** Consumers and credit cards: A review of the empirical literature. *Journal of Management and Marketing Research*.
- [In Press] **Robb, C. A.**, Babiarz, P., & Woodyard, A. (2012). The demand for financial professionals' advice: The role of financial knowledge, satisfaction, and confidence. *Financial Services Review*.
- Woodyard, A. & **Robb, C. A.** (2012). Financial Knowledge and the Gender Gap. *Journal of Financial Therapy*, 3(1), 1-16.
- Babiarz, P., **Robb, C. A.**, & Woodyard, A. (2012). Family Decision Making and Resource Protection Adequacy. *Journal of Consumer Affairs* 46(1), 1-36.
- Robb, C. A.**, Moody, B., & Abdel-Ghany, M. (2011-12) College Student Persistence to Degree: The Burden of Debt. *Journal of College Student Retention: Research, Theory, and Practice* 13(4), 431-456.
- James, R., Atilas, J., & **Robb, C. A.** (2011). Homeownership Plans among Hispanic Renters: Ethnic or Geographic Differences? *Housing and Society* 38(2), 191-209.
- Robb, C. A.** (2011). Financial Knowledge and Credit Card Behavior of College Students. *Journal of Family and Economic Issues*, 32(4), 690-698. DOI: 10.1007/s10834-011-9259-y.
- Robb, C. A.**, & Woodyard, A. S. (2011). Financial Knowledge and 'Best Practice' Behavior. *Journal of Financial Counseling and Planning*, 22(1), 36-46.
- Robb, C. A.** (2011). Paying for college: Advice from current students to incoming freshmen. *Family and Consumer Sciences Research Journal*, 39(4), 388-398.
- Robb, C. A.** & Pinto, M. B. (2010). College students and credit card use: An analysis of financially at-risk students. *College Student Journal* 44 (4), 823-835.
- Robb, C. A.** & James, R. N. (2009). Associations between individual characteristics and financial knowledge among college students. *Journal of Personal Finance*, 8, 170-184.
- James, R. N., Lauderdale, M. K., & **Robb, C. A.** (2009). The growth of charitable estate planning among Americans nearing retirement. *Financial Services Review*, 18(2).
- Pimentel, M., **Robb, C.**, & Houser, R. (2009). Money and marriage: An exploration of the relationship between marital satisfaction and money attitudes among couples. *The University of Alabama McNair Journal*, 9.
- Robb, C. A.** & Sharpe, D. L. (2009). Effect of personal financial knowledge on college students' credit card behavior. *Journal of Financial Counseling and Planning*, 20(1), 25-43.
- Robb, C. A.**, Huston, S. J., & Finke, M. S. (2008). The Mitigating Influence of Time Preference on the Relation between Smoking and BMI Scores. *International Journal of Obesity*. 32(11), 1670-1677.
- Robb, C. A.**, Reynolds, L. M., & Abdel-Ghany, M. (2007). Consumer preferences among fluid milks: Low-fat versus high-fat milk consumption in the United States. *International Journal of Consumer Studies*, 31 (1), 90-94.

Nielsen, A., Coleman, P. K., Guinn, M. & **Robb, C.** (2004). Length of institutionalization, contact with relatives and previous hospitalizations as predictors of social and emotional behavior in young Ugandan orphans. *Childhood, 11*, 94-116.

*[Under Review; Submitted 8/2/2011; Request for revisions received 10/25/2011] Woodyard, A. & **Robb, C. A.** Knowledge, feelings, and actions: Predicting financial satisfaction. *Journal of Personal Finance*.

Book Chapters:

Robb, C. A. (2012). Coming to terms with financial literacy. In D. Lamdin (Ed.), *Consumer Knowledge and Financial Decisions: Lifespan Perspectives* (3-14). New York: Springer.

Robb, C. A., & James, R. N. (2012). Credit cards as a market instrument: Consumer understanding and use. In D. Lamdin (Ed.), *Consumer Knowledge and Financial Decisions: Lifespan Perspectives* (101-112). New York: Springer.

James, R. N., III., **Robb, C. A.,** Carswell, A. T., & Atilas, J. H. (2010). Housing costs among low-income renters and homeowners: 'Rent v. buy' and the hidden costs of low-income homeownership. In S. Kis & I. Balough (Eds.), *Housing, housing costs and mortgages: Trends, impact and prediction*. (pp. 171-179). Hauppauge, NY: Nova Science Publishers.

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:

AFS (2012) **Robb, C. A.,** Chatterjee, S., Kutzman, S., & Carswell, A. The intermediate and long-term impacts of financial magazine stock picks.

FPA (2012) Britt, S. L., Archuleta, K. L., Britt, J. D., **Robb, C. A.,** Seay, M., and Bell, M. M. Stress, Personality and Risk Tolerance.

FTA (2012) Britt, S. L., Archuleta, K. L., Britt, J. D., **Robb, C. A.,** Seay, M., and Bell, M. M. Stress, Personality and Risk Tolerance.

NFCS Roundtable (2012) **Robb, C. A.** Invited Discussant. Financial literacy and retirement planning in the United States.

FNCE (2012) Gaines, A.; Knol, L.; **Robb, C. A.;** Sickler, S. Food insecurity is related to cooking self-efficacy and perceived food preparation resources among college students.

- ACCI Refereed Paper (2012). **Robb, C. A.**, Babiarz, P., & Woodyard, A. The Demand for Financial Professionals' Advice: The Role of Financial Knowledge, Satisfaction, and Confidence.
- ACCI Refereed Paper (2012). Glagola-Dunn, C., Knol, L. L., **Robb, C. A.**, & Crowe, K. The Monetary Impact of Grocery Tax in Alabama on Fruit and Vegetable Purchases in a Variety of Demographics.
- EFERMA Refereed Paper (2012). **Robb, C. A.**, Knol, L. L., Sickler, S., & Gaines, A. Food Security, Financial Resources and Spending Habits among College Students.
- ASSA Invited Panel Discussant (2012). **Robb, C. A.**, Cude, B. J., Harnisch, T. L., Lusardi, A., & Walstad, W. L. Financial Education for Undergraduates: Just in Time? Too Late?
- ACCI Refereed Paper (2011). **Robb, C. A.** & Woodyard, A. Financial knowledge and 'best practice' behavior.
- ACCI Refereed Paper (2011). **Robb, C. A.** & Pinto, M. B. College students and credit card use: An analysis of financially at-risk students.
- ACCI Poster Session (2011). Woodyard, A. & **Robb, C. A.** Financial knowledge and the gender gap.
- FNCE (2010). Gaines, A., Knol, L. L., & **Robb, C. A.** Beverage intake differs by food security status in adult males but not females.
- FNCE (2010). Knol, L. L. & **Robb, C. A.** Perceptions of dietary quality are not related to beverage intake among U.S. teens.
- ACCI Refereed Session (2010). James, R. N., Weagley, R. O., **Robb, C. A.**, Cude, B. J., Mauldin, T., Palmer, L., & Goetz, J. Innovative Teaching Methods in Undergraduate Consumer Economics and Financial Planning.
- ACCI Refereed Paper (2010). **Robb, C. A.** An exploration of the relationship between college student personal financial knowledge and credit card use behaviors.
- ACCI Poster Session (2010). **Robb, C. A.**, Babiarz, P., & Woodyard, A. Are you life confident? Family decision-making and income replacement adequacy.
- EFERMA Refereed Paper (2010). **Robb, C. A.**, Moody, B., & Abdel-Ghany, M. College student persistence to degree: The burden of debt
- FNCE (2009). Knol, L. L., **Robb, C. A.**, & Umstadt, M. R. Time spent in home food production among U.S. high school students: An analysis of the American Time Use Survey.
- FNCE (2009). Knol, L. L., **Robb, C. A.**, & Umstadt, M. R. Overall time use patterns among U.S. high school students: An analysis of the American Time Use Survey.
- International Consumer Sciences Research Conference (2009). James, R. N., Carswell, A. T., & **Robb, C. A.** Consumers, consumer information, and the homeownership decision: The importance of hidden costs.
- ACCI/AAEA Refereed Paper (2009). James, R. N., Lauderdale, M. K., & **Robb, C. A.** The growth of charitable estate planning among Americans nearing retirement.
- AFCPE Refereed Paper (2008). **Robb, C. A.** An exploration of the relationship between college student personal financial knowledge and credit card use behaviors.

ACCI/AAEA Refereed Paper (2008). **Robb, C. A.**, & James, R. N. Personal Financial Knowledge among College Students: Associations between Individual Characteristics and Scores on an Experimental Measure of Financial Knowledge.

EFERMA Research Paper (2008). James, R. N., Carswell, A., & **Robb, C. A.** Estimating the outlays of renting and owning: The risks of hidden ownership costs.

ACCI Refereed Paper (2007). **Robb, C. A.** College students and credit card debt: Means of obtainment and spending behavior.

ACCI Refereed Paper (2006). **Robb, C. A.**, Huston, S. A., & Finke, M. S. Re-evaluating the Relationship between Smoking and BMI: The Impact of Time Preference.

ACCI Poster Session (2005). **Robb, C. A.** Consumer Preferences among Fluid Milks: Low-fat versus High-fat Consumption in the United States (Revised).

ACCI Poster Session (2004). **Robb, C. A.** Trends and Patterns in Alcohol Consumption, United States.

Research Support:

Awarded:

Robb, C. A. (PI) 05/01/2012-05/01/2013
University of Alabama, Internal Grant, Research Grants Committee. *Financial well-being and student wellness.*
Award Amount: \$6,000

Robb, C. A. 02/15/2012 – 09/15/2012
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 02/14/2011
Credit card spending habits and alcohol consumption study.
Award Amount: \$2,650

Robb, C. A. (PI), Abdel-Ghany, M. 03/01/2009 – 09/01/2009
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. 08/23/2010
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. 02/17/2009
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) 01/15/06 – 01/15/07
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 458: Personal Financial Planning: Using Spreadsheets for Financial Decision-Making

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 Financial Counseling and Planning

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)