Jacob Prior Sybrowsky

800 W. University Parkway, MS 146 (801) 376-5122
Orem, UT 84058 jacob.sybrowsky@uvu.edu

EDUCATION:

Texas Tech University

- Ph.D. Personal Financial Planning
  Graduation: August 2011
- Finance Emphasis
  27 hours course work in AACSB accredited program
- Specializations in Finance & Economics

Brigham Young University

- Masters, Marriage Family Human Development
  Graduation: August 2007
- B.S., Linguistics
  Graduation: April 2004
- Minor: Korean

WORK EXPERIENCE:

Associate Dean, Woodbury School of Business, Utah Valley University, July 2014- Present

- Assist in strategy and vision for the WSB
- Assist in development and fundraising projects, including $78.9M building raise
- Co-manage $22M annual budget across five departments and graduate programs
- Assist in AACSB accreditation process and annual reporting over five years
- Supervise Department Chairs, Graduate staff & faculty (92 full-time faculty)
- Direct faculty development & refreshed annual reviews and RTP processes
- Direct academic program development (over 20 programs)
- Directed development of MBA, MAcc and MFPA graduate programs (300 students)
- Supervised Entrepreneurship Institute and Director
- Developed Money Management Resource Center for UVU
- Represent the Dean and WSB in UVU leadership meetings

Associate Professor, Department of Finance & Economics, Utah Valley University, June 2015

- I received tenure at the end of the 2014-2015 academic year while serving in a staff appointment as Associate Dean in the Woodbury School of Business

Assistant Professor, Department of Finance & Economics, Utah Valley University, December 2009- June 2014

- Established nationally renowned Personal Financial Planning major
  Largest undergraduate PFP program in the nation
  100% job placement for all graduates

- Established paid-internship program for all PFP majors
- Developed over 20 courses for PFP and Finance majors
- Developed integrated model practice & High School outreach programs
- Developed two additional CFP programs for professionals & a program for Chinese exchange students
- Raised funds for program development & new scholarship fund
- Created strategic partnerships with nationally renowned firms
- Taught seven courses within the Personal Financial Planning major:
  FIN 1060, 3060, 3210, 3220, 3400, 4270, 4290
- Served on University Investment, Finance and Benefits Committees
- Researched Wealth Transfers and Program Development

Associate Planner, Evensky & Katz Wealth Management, Corel Gables, FL, August 2008- August 2014
- Generated new business and develop client relationships
- Coordinated wealth management services for high net worth clients
- Generated comprehensive financial plans for high net worth clients
- Assisted with regional marketing
- Assisted with firm technology applications

Graduate Part-time Instructor, Personal Financial Planning, Texas Tech University, August 2006- December 2009
- Taught PFP 4380 (Advanced Technology) class
- Taught PFP 3376 (Asset 1) class
- Taught PFP 3301 (Intro to Financial Planning) class
- Researched Wealth Transfers and Money Attitudes
- Developed and delivered course curriculum
- Recruited new PFP majors

Graduate Research Assistant, Marriage Family Human Development (MFHD) September 2004- September 2006
- Coordinated teaching of MFHD 395R (Family Finance) class
- Researched for Adolescent Money Attitudes Project
- Assisted in developing class lectures

Department Leader, Missionary Training Center, Nov. 2001 to Jan. 2005
- Taught proficiency in the Korean language
- Organized classes and daily schedules
- Coordinated and lead meetings with team teachers

Undergraduate Research assistant, Brigham Young University, Marriage Family Human Development, June to Sept. 2004
- Conducted research on early 20th century financial habits
- Presented information to finance teachers

VOLUNTEER EXPERIENCE:

Certified Financial Planning (CFP®) Board- Counsel on Education, January 2019 to Present

- Assist in developing education standards for 88,000+ CFP Professionals
- Develop and vet strategic plan for CFP ® Board
- Review marketing plans
- Evaluate education appeals

MoneyWise Project, August 2010 to November 2017

- Created, reviewed and revised material used world-wide to teach self-reliance and faith-based personal finance skills
- Presented material to groups of up to 400 individuals and families

Utah Valley University Committee Service, January 2010 to Present

- Founding member of UVU IP and Technology Commercialization Committee
- Retirement Investment Oversight Committee- Advise on fund options for UVU employees
- Finance Committee- Advise on UVU insurance programs (health & life)
- Benefits Committee- Train employees and vet new benefit coverage options
- Planned Giving Committee- Fundraising & Business and Economic Forum
- Accreditation Committee- Maintain AACSB standards for WSB
- Policy Committee- Review new university policy for Faculty Senate
- Additional committee service listed below

B.Y.U. Library Board Member, Aug. 2001 to Sept. 2005 & Nov. 2010 to Present

- Served as a link between the library directors and students
- Participated in semi-annual budget meetings
- Served on the student advisory council

M.F.H.D. Family Finance Tutor, B.Y.U., August 2003 to August 2006

- Created presentations for class use
- Ran labs that provided additional help for students
- Taught selected lectures on family money management

Church volunteer, California Los Angeles Mission, Jan. 1999 to Jan. 2001

- Organized and taught English classes
- Taught religious principles to Korean natives
- Taught weekly development meetings

HONORS & AWARDS:

- Texas Tech University, Department of Personal Financial Planning- Young Guns- Distinguished Alumni Award, 2018
- Utah Valley Chamber of Commerce- Business and Education Partnership, 2015

- Utah Valley University Faculty Award; Philanthropy, 2014
- College of Human Sciences: Doctoral Student of the year, 2008
- Texas Tech Outstanding Graduate Instructor Award, 2007-08 academic year

PROFESSIONAL DESIGNATIONS:

- CRC® - Certified Retirement Counselor as of 2009-Present
- RFC® - Registered Financial Consultant as of 2012-2013

CURRENT SUBMISSIONS:

The Efficacy of Consumer Robo-Advisors. Dr. Rachel Bi, **Dr. Jacob Sybrowsky**

Developing a K-12 Financial Literacy Curriculum: A Practical Approach

RESEARCH PROJECTS IN PROCESS:

The Relationship between Private Wealth Transfers and Subsequent Wealth. **Dr. Jacob Sybrowsky**, Dr. Benjamin Cummings, Dr. Rachel Bi

Does Time Preference Predict the Response to a Wealth Shock? **Dr. Jacob Sybrowsky**, Dr. Tim Griesdorn

Understanding the Relationship Between Anxiety and Compulsive Purchasing. **Dr. Jacob Sybrowsky**, Dr. Ivan Beutler, Dr. Clinton Gudmunson

Developing a Masterful Internship Program: The Leveraged Learning Model

Understanding the Anxiety Money Attitude in the context of Impulsive Buying

PEER REVIEWED PUBLICATIONS:

Journal of Financial Planning, (2014) Vol 40. Does Time Preference Predict the Response to a Wealth Shock? **Dr. Jacob Sybrowsky**

Journal of Financial Planning, (2014). Trust: A Predictor of Portfolio Composition. **Dr. Jacob Sybrowsky**, Dr. Hyrum Smith

Journal of Financial Service Professionals, (2013). Is an all cash emergency fund strategy appropriate for all investors? **Dr. Jacob Sybrowsky**, Janine Scott, Duncan Williams, Dr. John Gilliam

Journal of Entrepreneurship Education, (2013). Vol. 16, p1. Teaching Entrepreneurship in Action: Using Ebay as an Educational Tool. **Dr. Jacob Sybrowsky**, Dr. Laurent Joisen
http://www.readperiodicals.com/201301/2995839351.html#ixzz2ZSKiIYEt

Journal of International Business Research, (2011). Vol. 11 (S1), 83-92. Enhancing Expatriate Selection: Measuring the Strength of Acculturation. Dr. Josien Laurent, **Dr. Jacob Sybrowsky**

National Association of Personal Financial Advisors, (2010). Compensation Among Financial Advisors: A Review of Current Methods. **Dr. Jacob Sybrowsky**, Craig Lemoine

Journal of Financial Service Professionals, (2009). 63(1), 51-59. Education Planning for the Middle Class Utilizing a Multiline Approach to College Savings. **Jacob Sybrowsky**, Craig Lemoine

Insurance News Magazine; (April, 2009). Smart Technology Planning for Advisors. **Jacob Sybrowsky,** Craig Lemoine.

Journal of Indexes, (July, 2005), A Brave New World: Exchange Traded Funds Face Off Against Index Funds. **Jacob Sybrowsky**, Craig Israelsen.

BOOK CHAPTERS:

Friel, T. (2016). Advanced Management for Deans. Charlotte, NC: Information Age Publishing Inc. (CH 5: Effective Academic Program Building: A Case Study from Utah Valley University)

CONFERENCES PRESENTATIONS:

Kansas State University Doctoral Seminar- Manhattan, Kansas, August, 2019
- Preparing for a career in an AACSB accredited business School. **Dr. Jacob P. Sybrowsky**

Academy for Global Business Advancement- Surakarta, Java, Indonesia; November 2016
- Positioning Programs for Growth. **Dr. Jacob P. Sybrowsky**

Opportunity Days Research and Development Symposium- Texas Tech University, Lubbock, TX; February 2016
- How to Take Your Financial Planning Program from 0 to 100 Students, and then from 100 to 200 Students. **Dr. Jacob P. Sybrowsky**, Dr. Luke Dean
- Party Like Gus: How to Manage Relationships with Faculty from Other Departments (that want to kill you!). **Dr. Jacob P. Sybrowsky**, Dr. Luke Dean

Opportunity Days Research and Development Symposium- Texas Tech University, Lubbock, TX; March 2015
- Preparing for the Job Market - Networking, Applying, Interviewing, and Schmoosing. **Dr. Jacob P. Sybrowsky**, Dr. Luke Dean
- Positioning a Program for Growth - Navigating University Politics. **Dr. Jacob P. Sybrowsky**, Dr. Luke Dean

Academy for Creating Enterprise Annual Conference- Cebu, Philippines; May 2014
- A Gospel Perspective on Personal Finance. **Dr. Jacob P. Sybrowsky**

Utah FPA Annual Symposium- Salt Lake City, UT; September 2014
- Trust: A Predictor of Portfolio Composition. **Dr. Jacob Sybrowsky**, Dr. Hyrum Smith

CFP Program Director's Conference- Washington DC; August 2014.
- A Cross-Disciplinary Approach to Financial Planning Education in Accredited Business Schools. **Dr. Jacob P. Sybrowsky**, Dr. Hyrum Smith, Dr. Jerry Mason
- Hands on Financial Planning: Educating Beyond the Classroom. **Dr. Jacob P. Sybrowsky**, Dr. Hyrum L. Smith, Dr. Jerry Mason.

FPA National Conference- Orlando, FL; October 2013
- Trust: A Predictor of Portfolio Composition. **Dr. Jacob Sybrowsky**, Dr. Hyrum Smith

CFP Program Director's Conference- Washington DC; August 2013.
- Using Internships to Enhance Engaged Education, Focus on Outreach and Strengthen Firms. **Dr. Jacob P. Sybrowsky**, Dr. Lowell Glenn, Dr. Jerry Mason
- Integrating Financial Planning Software in the Classroom. **Dr. Jacob P. Sybrowsky**,

Dr. Hyrum L. Smith, Dr. Lukas R. Dean.

Association for Financial Planning Counseling and Education, Annual Conference- Orlando, FL; November 2012.
- Buying Motivations that Lead to Healthy versus Harmful Buying Behaviors. **Dr. Jacob P. Sybrowsky**, Dr. Ivan Beutler, Dr. Clinton Gudmunson.

Financial Management Association, Annual Conference; October 2012.
- Hands on Financial Planning: Educating Beyond the Classroom. **Dr. Jacob P. Sybrowsky**, Dr. Hyrum L. Smith, Dr. Lukas R. Dean. Benjamin Cummings ABD.

Academy of Financial Services, Annual Conference; September 2012.
- Trust and Locus of Control as Predictors of Preferred Portfolio Composition. **Dr. Jacob Sybrowsky.**

CFP Program Director's Conference- Washington DC; August 2012.
- Hands on Financial Planning: Educating Beyond the Classroom. **Dr. Jacob P. Sybrowsky**, Dr. Hyrum L. Smith, Dr. Lukas R. Dean. Dr. Lowell Glenn

Utah Valley University Business & Economic Forum- Orem, UT; May 2012.
- How to Start a Financial Planning Program in an Accredited Business School. **Dr. Jacob P. Sybrowsky**, Dr. Lukas R. Dean.

Financial Management Association, Annual Conference; October 2011.
- How to start a financial planning degree in an Accredited Business School. Dr. Lukas R. Dean, **Dr. Jacob Sybrowsky,** Dr. Bill Gustafson, Dr. Hyrum Smith.

Academy of Financial Services, Annual Conference; October 2011.
- Factors Associated with Ownership in Small Business Retirement Plans. **Dr. Jacob P. Sybrowsky**, Dr. Hyrum L. Smith, Dr. Lukas R. Dean.

Financial Management Association, Annual Conference; October 2010.
- Integrating Financial Planning Software in the Classroom. **Jacob Sybrowsky,** Lukas R. Dean, Dr. Hyrum Smith.

Academy of Financial Services, Annual Conference, Anaheim, CA. Oct. 2010.
- Technology Use in Financial Planning Programs. **Jacob Sybrowsky,** Deena Katz, Craig Lemoine.
- The Effect of Transient Wealth Shocks on Subsequent Net Worth; a test of Life-Cycle Theory. **Jacob Sybrowsky,** Dr. Michael Finke.

Utah Council on Family Relations, Annual Conference, Brigham Young University, Provo, Utah; April 3, 2009.
- Real Families, Real Answers, how to make wealth grow; Opportuinities for Students in Financial Planning and Graduate Studies. **Jacob Sybrowsky**

Academy of Financial Services, Annual Conference, Boston, MA. Oct. 2-4, 2008.
- The Effect of Transient Wealth Shocks on Subsequent Net Worth. **Jacob Sybrowsky,** Dr. Michael Finke.
- The Effect of Credit Use and Debt Avoidance on the Paths Between Money Attitudes and Impulsive Buying Among U.S. College Students. **Jacob Sybrowsky,** Dr. Ivan Beutler, Tim Griesdorn.

Academy of Financial Services, Annual Conference, Orlando, FL. Oct. 16-17, 2007.
- Toward Understanding Financial Behavior: Affects of Money Attitudes on Financial Behaviors among U.S. College students. **Jacob Sybrowsky**.

Western Region Family Economics Association, Bi-Annual Conference, Tucson, AZ. Jan. 2007.
- Toward Understanding Money Attitudes and Impulsive Buying. **Jacob Sybrowsky,** Ivan F. Beutler.

Association for Financial Counseling and Planning Education, Annual Conference, San Antonio, TX. Nov., 2006.
- Paths toward Impulsive Buying: Mediating Effects of Credit Use and Debt Avoidance on Impulsive Buying. **Jacob Sybrowsky**, Ivan Beutler, J. Kelly McCoy.

Association for Financial Counseling and Planning Education, Annual Conference, Scottsdale, AZ. Nov. 15-18, 2005.
- The Financial Role of Earned and Entitled Allowances and the Economic Socialization of Children. Ivan F. Beutler, **Jacob Sybrowsky**.

Utah Jump$tart Coalition, $tart $mart Teacher Summit, Salt Lake City, Utah, October, 2005.
- Teen Money Attitudes. Ivan F. Beutler, Lucy B. Beutler, J. Kelly McCoy, Denise Gorrell, **Jacob Sybrowsky**

Ira R. Fulton Mentored Student Learning Conference, Brigham Young University, April 17, 2005.
- A Brave New World: Exchange Traded Funds Face Off Against Index Funds. **Jacob Sybrowsky**, Craig Israelsen.
- Adolescent Money Attitudes and Beliefs: The mediating effect of Credit Cards on Compulsive Buying among Adolescents. Ivan F. Beutler, Lucy Beutler, **Jacob Sybrowsky**, J. Kelly McKoy

Utah Council on Family Relations, Annual Conference, Weber State University, Ogden, Utah April 9, 2005. (Faculty research team and graduate student from the *MFHD 395R Mentored learning practicum: Adolescent Financial Education,* research presented to conference participants)
- Adolescent Money Attitudes and Beliefs: J. Kelly McCoy, Ivan F. Beutler, Lucy B.

Beutler, **Jacob Sybrowsky**

Association for Financial Counseling and Planning Education, Annual Conference, Denver, CO. Nov. 17-21, 2004.

- Adolescent Beliefs of What Money Will Buy: An Initial Inquiry. Todd M. Martin, **Jacob Sybrowsky**, Ivan F. Beutler, J. Kelly McCoy

Utah Council on Family Relations, Annual Conference, Utah State University, Logan, Utah April 9, 2004. (Faculty research team, a graduate student and 10 undergraduates from the *MFHD 395R Mentored learning practicum: Adolescent Financial Education,* research presented to conference participants)

- Materialism Among Utah Adolescents: J. Kelly McCoy, Ivan F. Beutler, Lucy B. Beutler, **Jacob Sybrowsky**, Erin Teichert, Jessica Jones, Mary Ryan, Janae Hardy, Amber Clement, Amber Swenson

MAGAZINE ARTICLES & ONLINE CONTRIBUTIONS:

Business Q Magazine (July 9, 2014)
30 in Their 30s: Young Powerhouses
http://utahvalley360.com/2014/06/13/new-kids-on-the-block-30-business-rockstars-in-their-30s/

Deseret News (December 17, 2013)
Unexpected Shocks; New Ways to Look at Emergency Fund Savings
http://www.deseretnews.com/article/865592535/New-ways-to-look-at-emergency- funds.html?pg=all

Wall Street Journal (December 4, 2013)
Keep Emergency Fund in Cash or Invest?
http://online.wsj.com/news/articles/SB100014240527023041067045791355591043205838

Financial Planning Magazine (November 1, 2013)
30 Great Schools for Financial Planning
http://www.financial-planning.com/fp_issues/2013_11/30-great-schools-for-financial- planning-2687031-1.html

CardHub (July 9, 2013)
Ask the Experts: How Can We Improve Financial Literacy in the U.S.?- by: John Kiernan
http://www.cardhub.com/edu/ask-the-experts-financial-literacy-policy/

Financial Planning Magazine (November 1, 2012)
25 Great Schools For Future Financial Planners- by: Ann E. Marsh
http://digital.financial-planning.com/financialplanning/201211?pg=72#pg72

Retirement Researcher (August 11, 2012)
CFP Board Conference 2012- by: Wade Pfau
http://wpfau.blogspot.com/2012_08_11_archive.html

Zywave Online (October 15, 2012)
Financial Planning Challenge: Investing in the Industry's Future- by: Kory Wells
http://www.zywave.com/blogs/2012/10/15/financial-planning-challenge-investing-in-the-industrys-future/

PlanPlus Software
http://www.planipedia.org/index.php/Education_Planning

Deseret News (September 6, 2012)
The secret to doubling your assets in retirement: Being married- by Joey Ferguson
http://www.deseretnews.com/article/865561897/The-secret-to-doubling-your-

assets-in-retirement-Being-married.html?pg=all

Fox 13 News (July 25, 2011)
UVU to Offer Personal Finance Planning Bachelor Degree
http://utahcountynorth.fox13now.com/news/news/58654-uvu-offer-personal-finance-planning-bachelor-degree

Financial Planning Magazine (November 1, 2011)
Financial Planning Education 101: 10 Standout Schools- by: Danielle Reed
http://www.financial-planning.com/fp_issues/2011_11/financial-planning-education-10-standout-schools-2675690-1.html?pg=7

United Families International
http://worldfamilyforum.com/pages/finbud-fin02-g.php

EDUCATION AND COMMUNITY PRESENTATIONS:

UVU PACE- Summer Education Program
Understanding Your Benefits, Preparing for Your Future
August 12, 2016

Marriage Celebration- Weber State University
Preparing for Your Future- Together
February 19, 2016

UVU Professional & Continuing Education & The Wolverine Business Institute
Leader's Toolbox
January 15, 2016

Utah Valley Estate Planning Council
Current research in Personal Financial Planning
February 06, 2013

National Advisory Council Presentation
Future of the PFP Program at UVU
March 1, 2012

New EE seminars
Understanding Benefits, Investments and Retirement at UVU
Monthly, since summer 2012
With Dr. Jerry Mason

Moneywise Presentations
A Gospel Perspective on Personal Finance
Six part, six hour series, taught twice each semester since spring of 2011
Taught with ten additional business and academic professionals

USU Financial Planning Association
Preparation for Graduate School in Personal Financial Planning
Feb 12, 2013- USU speech

UCCU Family Festival
Personal Financial Planning Basics (4, 1-hr. sessions)
Nov. 9-10, 2012

Ph.D. student seminar
Innovative Program Design
Lubbock, TX
Feb. 23, 2012

Utah Teachers Association
Education using Basic Personal Finance Principles
Nov, 5, 2011

Community Seminar Series
Retirement Planning
Provo Library, May 17, 2011

Community Outreach
Personal Finance Basics
Feb. 26, 2011

Knowledge is Money
Educational Seminar for Aspiring Professionals
Feb. 11, 2011

SERVICE & PROGRAM DEVELOPMENT (SUMMARY):

Personal Financial Planning Program Accomplishments:

- Ranked in the top Personal Financial Planning programs nationally, Nov. 2011 (Financial Planning Magazine)
- Ranked as outstanding program nationally, Nov. 2012 (Financial Planning Magazine)
- Ranked as a top program nationally, Nov. 2013 (Financial Planning Magazine)
- Over 140 majors currently enrolled
  - 1 in 3 declared majors are women
  - Largest PFP under-grad program in the nation
- 1st place! IARFC- international financial planning competition
- 1st place! NAGDCA Retirement quiz bowl
- Finalists- FPA financial planning challenge
- Finalists- AICPA annual tax challenge
- Personal Financial Planning Association (PFPA) registered with UVU and national FPA
  - One of 22 student chapters nationwide
  - One of the largest student chapters in the nation
- PFPA hosted Utah's FPA chapter on campus in March with over 60 of the State's top professionals
- First students graduated Dec. 2012 one year after establishing the major
- All grads are employed in salaried positions with exceptional Financial Planning Firms
- 100% salaried job placement
- Most students are being hired as early as their junior year
- Spring 2013 PFP banquet, 200 attended (planned annual event)
- Organized $52,500 scholarship donation
- REISA donation of $10,000-12,000
- Additional donations in excess of $30,000 for program development
- REISA grant for student research project is funded (Brennon Bowen and Craig Rollins)
- Second largest PFP software library nationally
  - Over $2,000,000 in software donations for lab
- We have ownership in an advanced Estate Planning program
- Largest number of course offerings nationally (Undergrad level)
- Implemented two additional offerings:
  - A certificate program for professionals- seven courses, executive style
  - An international program for Chinese professionals
- Master's program is being developed
- Created a K-12 curriculum for Provo School District (w/ Jessica Mecham- student)
- Students are working in area high schools, teaching general financial literacy
- Completed service learning designation for PFP program
- Secured Fidelity internship at Orem branch (one of only 18 in the nation)
- Offer approximately six paid internships per student

- Five students placed with LJ Cooper for extended internships (regional top firm)
- RFC magazine article on UVU interns
- Developed model practice concept
  - Expected opening is Spring 2014
  - Serves community members (low cost financial planning services)
  - Serves High schools
  - Serves UVU community
  - Serves local financial planners and financial services professionals
- 109th officially board registered CFP® resident major program
- Traveled with students to:
  - (Schwab IMPACT) Annual conference, Washington DC
  - (FPA)* Financial Planning Association annual conference; Orlando, FL
  - (NAGDCA) National Association of Governmental Defined Contribution Administrators; Louisville, KY
  - (REISA)* Real Estate Investment Securities Analysis Fall Conference; Las Vegas, NV
  - (REISA)* Real Estate Investment Securities Analysis Spring Symposium; San Diego, CA
  - (FSP) Financial Services Professional Utah Chapter; Salt Lake City, UT
  - (Utah FPA)* Financial Planning Association Utah Chapter; Salt Lake City, UT
  - TD Ameritrade Conference; San Diego, CA
  - (AFCPE) Association for Financial Counseling, Planning and Education; Greenville, SC
  - * Students provided support for the conference
- Set up internship programs to provide a constant stream of students to:
  - Schwab
  - TD Ameritrade
  - Edward Jones
  - Farmers Insurance
  - NorthWestern Mutual (1st salaried internship program in the country)
- We are providing HR sponsored investment education for all UVU employees
- Co-sponsoring UCCU's Family Festival each November
- Business and Economic Forum
- PFPA President is a student rep for the National FPA Organization

Personal Financial Planning Program Development:

- Advisory Board
  - Helped create National Advisory Board for PFP major
- Certificate Program
  - Developing a Certificate Program in PFP for working professionals
- Internship Program
  - Co-developed nationally recognized internship program
  - Coordinate student internships
  - Evaluate internship providers

- Student Competitions
  - Led FPA team
  - Led FSP team
  - Consulted on IARFC challenge
  - Led iOme teams
  - Led NAGDCA scholarship team (Paulo Desouza)
  - Developed NorthWestern Mutual competition

- Marketing Program
  - Co-developed PFP marketing plan

- CFP Board Registration
  - Complete annual registration in accordance with CFP Board regulations

- Donated Software (arranged for donation to UVU):
  - Finametrica
  - Whiffen- Estate Planning Software
  - IPS Advisor Pro
  - Junxure
  - MoneyGuide Pro
  - Moneytree
  - Morningstar
  - Naviplan
  - PlanPlus
  - Redtail
  - Sunguard

- China Program
  - Developed international education partnership
  - Designed as a fundraising instrument

Courses Taught:

FIN 1060 (Intro to Personal Finance)
FIN 3060 (Intro to Personal Financial Planning)
FIN 3210 (Retirement Planning)
FIN 3220 (Risk Management and Insurance)
FIN 3400 (Investments)
FIN 4270 (Wealth Management Seminar)
FIN 4290 (PFP Technology)

Additional Courses Developed:

FIN 3200 (Financial Counseling)
FIN 4210 (Estate Planning Fundamentals)
FIN 4800 (PFP Capstone)
FIN 481R (PFP Internship)

FIN 405G (Global Intercultural Finance Perspectives)
FIN 4310 (Real Estate Investment)
FIN 4320 (Real Estate Development)
FIN 4330 (Real Estate Management)
FIN 4610 (Financial Services CRM & Practice Management)
FIN 4600 (Special Topics in PFP)
FIN 4620 (Series 7 Prep Course)
FIN 3300 (Tax Planning for Personal Financial Planners)
FIN 4200 (Financial Counseling Practicum)
FIN 457R (Special Topics in Finance)
FIN 494R (PFP Internship Seminar)
Personal Financial Planning Certificate Program

Internal Service & Outreach:

New Employee Trainings
Developed and taught education for all new UVU employees

Personal Financial Planning Club Advisor

Cashflow Club Advisor

Center for Financial Success/Model Practice
Partnered with UCCU
Fundraising for CFS

SIFE Advisor
Advised students

External Service & Outreach:

HS outreach program
Co-developed k-12 curriculum
Accredited Financial Educator Designation

Money-Fair
Developing an Annual Community Outreach Event

Prison Ed
Developed FIN 1060 concurrent enrollment curriculum for inmates
Graded and administered course

United Families International
Developed online content for international use through United Nations partner

Fundraising (various and ongoing initiatives with the following groups):

Former BYU PFP students

Endowed Scholarship
Fidelity
International Association of Registered Financial Consultants
NorthWestern Mutual
Real Estate Investment and Securities Association
Schwab
TD Ameritrade
Utah Community Credit Union

Professional Organization & Memberships:

Association for Financial Counseling and Planning Education*
Academy of Financial Services
  Board member
Journal of Family & Economic Issues
  Reviewer
Financial Planning Association*
  Journal reviewed
  Utah Chapter board member
  UVU Faculty Advisor
Financial Management Association
National Association of Governmental Defined Contribution Administrators*
National Association of Personal Financial Advisors*
NorthWestern Mutual Program Advisor*
CFP Board Program Director
Real Estate Investment & Security Association*
  Coordinate conference logistics
  Coordinate internships and interviews for students
Schwab IMPACT Program Advisor*
TD Ameritrade Guest*
  *- indicates student involvement

Committee Service:

Accreditation committee
  Jan. 2011 - Aug. 2011 & July 2013 – current

Assessment committee
  Jan. 2010 – Dec. 2010

HR Wellness Committee
  Jan. 2012 – current

UVU Benefits Committee
  July 2012 – current

UVU Finance & Investment committee
Jan. 2013 – current

Planned Giving Committee
Aug. 2010 - current

UVU Policy committee
Aug. 2011 – March 2013

Strategy committee
Aug. 2012 – current

Wellness Program Committee Member
Fiscally Fit Program (Feb. 2012)

Business & Economic Committee Forum Member
Coordinated Student volunteers
Organized Speakers

Associate Vice President of Finance Search Committee (Mark Weisenburg)

Personal Financial Planning Search Committee (Jerry Mason)

Personal Financial Planning Search Committee (Hyrum Smith)

Finance Search Committee (Vaughn Cox)