

## **Dr. Qianwen (Rachel) Bi**

---

Woodbury Business School  
Department of Finance and Economics  
Utah Valley University  
800 West University Parkway  
Orem, UT 84058

Title: Assistant Professor  
Office: (801)-863-8761  
Mobile: (806)-224-3662  
Email: rachel.bi@uvu.edu

### **EDUCATION**

---

**Texas Tech University,**

Ph.D. in Personal Financial Planning, 2015

M.B.A., concentration in Finance, Rawls of Business School, 2011

Master, in Personal Financial Planning, 2011

**Dalian Maritime University,**

B.S., in Management of Information Systems, 2007

### **AREAS OF INTEREST**

---

**Research:**

Financial Technology Impact, Behavioral Finance, Portfolio Optimization,  
Financial Literacy

**Teaching:**

Professional Technology in PFP, Investments, Corporate Finance, Fundamentals  
of Financial Planning, Risk Management, Asset Management, Retirement  
Planning, Estate Planning, Financial Planning Capstone, Behavioral Finance

### **RESEARCH**

---

Bi, Q. and Finke, M.S. 2014, Financial Software Use and Retirement Planning, Journal  
of Financial Counseling and Planning (Accepted with minor revise).

Dorman, T., Mulholland, B., Bi, Q. and Evensky, H. 2015, The Efficacy of Publicly-  
Available Retirement Planning Tools, Journal of Consumer Affairs (Submitting).

Bi, Q. and Finke, M.S. 2015, Retirement Planning Software, Journal of Retirement  
(Submitting).

Bi, Q. and Huston, S.J. 2015, The Impact of Technology on Positive Financial Behavior,  
Journal of Financial Counseling and Planning (Submitting).

Bi, Q. and Meng, X. 2016, The Impact of Financial Software Use on Financial Literacy,  
Journal of Financial Counseling and Planning (Submitting).

Bi, Q., Dorman, T., Mulholland, B. and Evensky, H. 2016, The Efficacy of Robo-  
Advisor (Working paper).

Bi, Q. and Willardson, N. 2016, Computer Software and Retirement Savings Accuracy (Working paper).

Bi, Q. and Ricaldi, L. 2016, Credit Card and Technology Use (Working paper).

Bi, Q. 2016, Financial Software Use and Financial Knowledge: Evidence from China. (Working paper).

## **PRESENTATIONS**

---

### **Conference Presentations:**

Bi, Q. 2013, “Consumer Computer Software and Retirement.” Presented at the Academy of Financial Services (AFS) Conference. Chicago, IL.

Bi, Q., and Huston, S. 2013, “ The Impact of Using Financial Technology on Positive Financial Behaviors.” Presented at the 2014 American Council on Consumer Interests (ACCI) conference. Milwaukee, WI

Bi, Q. and Huston, S. 2014, “Retirement Saving and the Use of Financial Software.” Presented at the Association for Financial Counseling, Planning and Education (AFCPE) conference. Bellevue, Washington.

Bi, Q., Dorman, T. and Mulholland, B. 2015, “The Efficacy of Publicly-Available Retirement Planning Tools.” Presented at the Academy of Financial Services (AFS) conference. Orlando, FL.

Bi, Q. 2016, “The Impact of Financial Software Use on Financial Literacy.” Presented at the Asian Consumer and Family Economics Association (ACEFA) conference. Hong Kong, China.

### **Other Presentations:**

Bi, Q., Mulholland, B. and Sybrowsky, J. 2010, “Financial Planning Technology Used in Academy Area.” Panel discussion speaker at the Technology Tools for Today (T3) Conference. San Diego, CA.

Bi, Q. 2012, “Education Funding in Financial Planning.” Content Expert. Presented at the Department of Financial Planning. Lubbock, TX.

Bi, Q. and Mulholland, B. 2013, “When Students Advise the Advisor on Technology.” Presented at the Technology Tools for Today (T3) Conference. Miami, FL.

Bi, Q. and Mulholland, B. 2016, "Engaging the Next Generation through Technology-A Millennial Perspective." Panel discussion speaker at the Technology Tools for Today (T3) Conference. Fort Lauderdale, FL.

Bi, Q. 2016, "Financial Literacy Education in U.S." Presented at Dalian Maritime University. Dalian, China.

Bi, Q. 2016, "Financial Literacy Education in U.S." Presented at Shenyang Aerospace University. Shenyang, China.

## **TEACHING EXPERIENCE**

---

Summer 2015-Present	Personal Finance	Utah Valley University
Spring 2015-Present	Technology Application in PFP	Utah Valley University
Fall 2014-Present	Business Statistics	Utah Valley University
Summer 2014	Managing Risks	Texas Tech University
Fall 2010-Fall 2013	Professional Technology in PFP	Texas Tech University

## **AWARDS**

---

<b>2016</b>	Summer Research Grant Award
<b>2015</b>	Undergraduate Research Scholarly and Creative Activities
<b>2015</b>	Summer Research Grant Award
<b>2014</b>	AFCPE Outstanding Paper Award
<b>2012-2014</b>	TTU President Doctoral Expense TA
<b>2011-2012</b>	TTU Graduate School Designated Scholarship
<b>2012/2010</b>	FPA DFW Scholarship
<b>2010/2009/2008/2007</b>	TTU Rawls of Business Administration Graduate Scholarship
<b>2005-2006</b>	Wilson First Class Scholarship

## **CONTINUING EDUCATION**

---

<b>2016</b>	<b>Learning Circle</b> Faculty Center Utah Valley University
<b>2015-2016</b>	<b>Teaching Academy</b> Faculty Center Utah Valley University
<b>2014-2015</b>	<b>New Faculty Teaching Scholars</b> Faculty Center Utah Valley University
<b>2014</b>	<b>Great Teachers' Summit</b> Faculty Center Utah Valley University

- 2013**      **Blackboard Learning 9.1 Training**  
Teaching, Learning, and Technology Center  
Texas Tech University
- 2013**      **TEACH Talk Discussion: Encouraging Student Participation**  
Teaching, Learning, and Technology Center  
Texas Tech University
- 2013**      **Writing Your Teaching Philosophy**  
Teaching, Learning, and Technology Center  
Texas Tech University

## **SERVICE**

---

<b>2016</b>	Member	AFCPE Research Task Force
<b>2016</b>	Member	Great Minds Website Committee
<b>2016</b>	Chaperon	MBA International Trip (China)
<b>2015-2016</b>	Advisor	PFFA Student Leadership Club
<b>2015</b>	Member	Faculty Search Committee
<b>2014-</b>	Expert	Financial Education Program in China
<b>2012-</b>	Assistant	Financial Advisor Student Technology (FASTech)
<b>2011</b>	Volunteer	Financial Planning Association (FPA) Conference
<b>2009-2010</b>	President	TTU Association of Chinese Scholars and Students
<b>2007-2008</b>	Vice President	TTU Chinese Association and Chinese Club
<b>2005-2006</b>	President	DMU Student Association

## **PROFESSIONAL AFFILIATION**

---

<b>2014-</b>	Association for Financial Counseling, Planning and Education (AFCPE)
<b>2013-</b>	Academy of Financial Service (AFS)
<b>2013-</b>	Financial Therapy Association (FTA)
<b>2011-</b>	Financial Planning Association (FPA)
<b>2010-</b>	Technology Tools for Today (T3)

## **REVIEWER FOR**

---

Journal of Financial Counseling and Planning (JFCP)  
Journal of Business Inquiry (JBI)