Kristy L. Archuleta

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University of Georgia
Athens, GA 30602

Education

Doctor of Philosophy in Human Ecology with a Specialization in Marriage and Family Therapy
Certificate & Emphasis: Personal Financial Planning
Kansas State University 2008

Master of Science in Marriage and Family Therapy
Kansas State University 2005

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, 2007-Present
- Certified Financial Therapist-I™, 2020-present

Selected Professional & Clinical/Supervisory Experience

Financial Planning, Housing & Consumer Economics
University of Georgia, Athens, GA
Professor & Graduate Faculty Member July 2020 – present
Associate Professor & Graduate Faculty Member August 2018 – June 2020

ASPIRE Clinic
University of Georgia, Athens, GA
Instructor & Supervisor January 2019 - present

National Association of Personal Financial Advisors
Chicago, IL
Board of Directors September 2019 - present
Executive trustee, NAPFA National Consumer Education Foundation September 2020 - present

Journal of Financial Therapy
Manhattan, KS/Athens, GA
Editor-in-Chief/Co-Editor (2010-2012) January 2010 - present

Financial Therapy Association
Manhattan, KS/ Clearwater, FL/ Princeton Junction, NJ
Regulatory Committee/Certification Committee October 2016 – present
Past-President, President, & President-Elect January 2014 – December 2017
Strategic Planning Committee September 2015-December2017
Chair, Continuing Education Committee January 2015 – December 2017
Treasurer November 2011-December2014
Research Liaison January 2010 – November 2011

Co-Founder and Board of Directors Member January 2010 – December 2017

School of Family Studies and Human Services
Kansas State University, Manhattan, KS
Program Director, Personal Financial Planning October 2015 – July 2018
Assistant/Associate Professor and Graduate Faculty Member August 2008 – July 2018

Institute of Personal Financial Planning and Therapy Clinic
Kansas State University, Manhattan, KS
Co-Founder/Instructor/Financial Counselor/Therapist January 2009 – May 2018

Andrews & Associates, Inc.
Manhattan, KS
Family Therapist August 2007-May 2018

Women Managing the Farm
Manhattan, KS
Co-Founder, Conference Chair, Committee Member October 2004 – Spring 2011

Teaching Experience

Courses Taught:

- University of Georgia
  - FHCE 8550: Money ad Relationships*, Fall 2020
  - FHCE 3250: Survey of Financial Planning, Fall 2018-2019, Spring 2019
  - FHCE 5204/7205: Practicum Spring 2019-2020, Fall 2019-2020
  - FHCE 4900/6900: Survey of Financial Therapy*, Spring 2020
- Kansas State University
  - FSHS/PFP 769: Money and Relationships (Online)*, Spring 2015-Spring 2016
  - FSHS/PFP 808: Research Collaboration in FSHS, Spring 2011-Spring 2018
  - FSHS/PFP 756/956: Financial Counseling/Clinical Research and Applications in Personal Financial Planning & Counseling (Doctoral)*/Summer 2011-Summer 2017
  - FSHS 888: Research Methods in FSHS I (Online)*, Fall 2009-Fall 2017
  - FSHS 756: Financial Counseling*, Fall 2010-2015
  - FSHS/PFP 979: Advanced Professional Issues in FSHS*, Spring with Summer travel to South Korea (2012, 2016) and The Netherlands (2014, 2018)
  - FSHS 100: Careers in Personal Financial Planning, Spring 2015
  - FSHS 105: Intro to Personal Family Finance, Spring 2009-2012; Summer 2010-2014
  - FSHS/PFP 105: Intro to Personal Financial Planning (Online)*, Spring 2013-2014, Summer 2010-2014

**Courses Developed (not previously offered)*

Selected Refereed Journal Articles

Archuleta, K. L., Asebedo, S. D., Durband, D. B., Fife, S. T., Ford, M. R., Gray, B. T., Lurtz, M. R., McCoy, M. A., Pickens, J. C., & Sheridan, J. (submitted). Facilitating *virtual* client meetings for money conversations: Skills, strategies, and outcomes. (Equal authorship contribution in alphabetical order.). *Journal of Financial Planning*.

Lurtz, M., Kothakota, M., Archuleta, K., & Heckman, S. (in press). The effect of risk literacy and visual aids on portfolio choices among professional financial planners. *Financial Services Review*.

Koochel, E., Markham, M., Crawford, D., & Archuleta, K. L. (2020). Financial transparency: Scale development. *Journal of Financial Counseling and Planning, 31*(1), 14-27. doi:10.1891/JFCP-18-00009 *Outstanding Journal Article Award.

Archuleta, K. L., & Lutter, S. (2020). Utilizing family systems theory in financial therapy. *Financial Planning Review*, *3*(1), doi: 10.1002/cfp2.1073.

Archuleta, K. L., Mielitz, K., Jayne, D., & Le, V. (2020). Financial goal setting, financial anxiety, and solution-focused financial therapy (SFFT): A quasi-experimental outcome study. *Journal of Contemporary Family Therapy, 42*(1), 68-76. doi:10.1007/s10591-019-09591-0

Ford, M. R., Ellis, E. M., Goetz, J., Archuleta, K. L., Gale, J. E., Grossman, B., Grant, E., & Gonyea, J. (2020). Depression and financial distress in a clinical population: The value of interdisciplinary services and training. *Journal of Contemporary Family Therapy, 42*(1), 5-14. doi: 10.1007/s1059

Grable, J. E., Archuleta, K. L., Ford, M. R., Kruger, M., Gale, J., & Goetz, J. (2020). The moderating effect of generalized anxiety and financial knowledge on financial behaviors. *Journal of Contemporary Family Therapy, 42*(1), 15-24. doi: 10.1007/s10591-019-09520-x

Archuleta, K. L., Stueve, C., Stebbins, R. Kenmitz, R., Chaffin, C., Williams, K., Poplaski, S., Sages, R. A., Tibbets, R., Burr, E. A. (2019). Exploring Perceptions of Graduates' Experiences That Impact Certified Financial Planner Certification: A Multiple Case Inquiry. *Journal of Financial Counseling and Planning*, *30*(2), 323-334. doi: 10.1891/1052-3073.30.2.323

Mielitz, K., Lurtz, M., Clady, J., & Archuleta, K. L. (2019). Barriers to banking: A mixed methods investigation of previously incarcerated individuals' banking perceptions and financial knowledge. *Journal of Consumer Affairs*, *53*(4), 1748-1774. doi: 10.1111/joca.12260

Asebedo, S., Seay, M., Wilmarth, M., Archuleta, K. L., Brase, G. L., & MacDonald, M. (2019). Personality and saving behavior among older adults. *Journal of Consumer Affairs, 53*(2). doi: 10.1111/joca.12199

Asebedo, S., Seay, M., Archuleta, K. L., & Brase, G. (2019). The psychological predictors of older pre-retirees' financial self-efficacy beliefs. *Journal of Behavioral Finance*, *20*(2), 127-138. doi:10.1080/15427560.2018.1492580

Mielitz, K. S., Lurtz, M., Clady, J., & Archuleta, K. (2018). After release: A qualitative investigation into the financial lives of former offenders. *Corrections: Policy, Practice and Research*, 1-16. doi:10.1080/23774657.2017.1383215

Selected Books and Refereed Book Chapters

Mallette, J., Richardson, E., Archuleta, K. L., & Olsen, C. S. (in press). Rural families. In S. Ballard & A. Taylor (Eds.), *Family life education with diverse populations* (2nd ed.). Sage Publications.

Archuleta, K. L., Asebedo, S., & Palmer, L. (2018). Contemporary theories and frameworks for use in financial counseling. In D. Durband, A. Mazzolini, & R. Law (Eds.), *Integrated Evidence Based Financial Counseling*. New York: Springer.

Archuleta, K. L., & Britt-Lutter, S. L. (2018). Marriage and family therapy, financial therapy, & client psychology. In C. S. Chaffin (Ed.), *Client Psychology*. Hoboken, NJ: Wiley.

Selected International Refereed or Invited Presentations

Archuleta, K. L. & Lim. H. (May 2018). *Client Psychology: Financial Decision-Making & Financial Therapy*. Invited presentation at CFA Society VBA Netherlands, Erasmus University, Rotterdam, The Netherlands.

Archuleta, K. L. (May 2016). *Expanding Beyond Financial Planning: Financial Therapy in the U.S.* Invited presentation to Seoul National University-Kansas State University Colloquium, Seoul, South Korea.

Mendiola, M., Mull, J., Archuleta, K. L., & Klontz, B. T. (May 2016). *Does it matter who makes more? Exploring how income disparity impacts types of relationship arguments.* Research paper presented at the Korean Financial Planning Association, Seoul, South Korea.

Selected National Refereed Presentations

Durband, D., Murray, T., & Archuleta, K. L. (November 2020). Pivoting to remote teaching in financial counseling and financial therapy courses. Practice presentation given at the Association of Financial Counseling and Planning Education annual symposium.

McCoy, M., Ponciano, I., & Archuleta, K. L. (October 2020). How being you impacts your work: A live demonstration of person of the therapist genogram exploration. Presentation given at the Financial Therapy Association annual conference.

Archuleta, K. L., Lawson, D. R., Glenn, C., Clady, J., & Jeong, D. (2019). *Can Money Habitudes™ make a difference? An experiment to bridge research and practice*. Research paper presented at the Association of Financial Counseling and Planning Education annual symposium, Portland, OR. (National Endowment for Financial Education Research to Practice Award).

Grable, J.E., Archuleta, K. L., Ford, M., Gale, J., & Goetz, J. (May 2019). *The moderating effect of generalized anxiety and financial knowledge on financial management behavior.* Research paper to be presented that the Financial Therapy Association Annual Conference, Austin, TX.

Lurtz, M., Kothokota, M., Magwewe, F., Archuleta, K. L., Jorgenson, T., & Adams, J. (February 2019). *Do financial planners really assess risk tolerance? An inquiry about perceptions of risk.* Research poster presented at the CFP Board Academic Research Colloquium, Washington, D.C.

National Invited Presentations

Grable, J. E., & Archuleta, K. L. (November 2020). *Managing client emotion & behavior*. Invited keynote to the Wharton School of Business-CFP Board Client Psychology forum.

Archuleta, K. L. (May 2020). *Managing client emotion during uncertainty.* Facilitated presentation given to National Association of Personal Financial Advisors Annual Spring Connect Conference (Online Conference).

Archuleta, K.L. (May 2020). *Managing clients' money fears and anxieties during these uncertain times.* Webinar presented for Financial Therapy Association.

Archuleta, K. L. (November 2019). *Are your client couples in for a rude awakening?* Webinar presented for Hartford Funds Advisors.

Grable, J.E. & Archuleta, K. L. (November 2019). *Anxious & Stress. Lessons learned from clients in the lab.* Invited keynote presentation to Financial Planning Association of New Jersey. Newark, NJ.

Archuleta, K. L. (September 2019). *New frontiers: Financial therapy*. Invited keynote to the Financial Planning Association of Greater Phoenix annual conference. Scottsdale, AZ.

Grable, J. E., & Archuleta, K. L. (July 2019). *Managing client emotion & behavior*. Invited keynote to the Wharton School of Business-CFP Board Client Psychology forum. San Francisco, CA.

Archuleta, K. L. (April 2019). *Marriage and family therapy*. Invited keynote to the Wharton School of Business-CFP Board Client Psychology forum. Philadelphia, PA.

Archuleta, K. L., Cabonaro, C., & Foss, K. (April 2019). *Changing clients' behavior with financial therapy*. Panelist at Financial Advisors Magazine's Invest in Women conference, Atlanta, GA.

Grable, J.E. & Archuleta, K. L. (April 2019). *What we know about clients. Lessons from the lab.* Invited keynote presentation to Northeast region National Association of Personal Financial Advisors Meeting. Philadelphia, PA.

Archuleta, K. L. (November 2018). *Tapping clients' strengths to achieve success.* Texas A&M Commerce Financial Planning Day. McKinney, TX.

Archuleta, K. L. & Coambs, E. (September 2018). *Family Financial Therapy: An Introduction.* Society of Financial Education and Professional Development Annual Financial Literacy Leadership Conference. New Orleans, LA.

Regional, State, and Local Presentations

Archuleta, K. L. (August 2019). *The keys to change.* Invited presentation to the American Association of Daily Money Managers Atlanta Chapter. Atlanta, GA.

Archuleta, K. L (February 2019) *The state of financial well-being*. Invited presentation to the UGA Carl Vinson Institute of Government Certified Public Manager® Conference, Athens, GA.

Selected Public Service/News

1. Interviewed for "Innovating Advice" podcast for *Incorporating financial therapy into your business with Dr. Kristy Archuleta* by Kate Holmes. October 6, 2020. https://www.innovatingadvice.com/post/episode64
2. Quoted in "How maximizers can cut decision-making angst." By Liz Weston. *NerdWallet* and *Associated Press*, June 25, 2020. https://www.nerdwallet.com/article/finance/maximizer-vs-satisficer
3. Quoted in "Ch-Ch-Ch-Changes: How your budget has adapted to the coronavirus." By Jean Chatzky. *SavvyMoney®.* May 11, 2020. https://www.savvymoney.com/blog/spending/ch-ch-ch-changes-how-your-budget-has-adjusted-to-coronavirus/
4. Featured in "Stressed about money? Financial therapy can help." By Allyson Mann. UGA Marketing & Communications, March 17, 2020. https://news.uga.edu/archuleta-financial-therapy-research/
5. Quoted in "Stop assuming millennials struggling financially have a spending problem." By Meghan Leonhardt. *CNBC,* March 3, 2020. https://www.cnbc.com/2020/03/03/stop-assuming-millennials-have-a-spending-problem.html
6. Quoted in "5 big myths about money and parenting." By Dani Blum. *New York Times*, February 18, 2020. https://www.nytimes.com/2020/02/18/parenting/money-savings-children.html.
7. Quoted in "These money habits in your 'financial junk drawer' may be doing you more harm than good." By Jill Cornfield. CNBC, December 10, 2019. https://www.cnbc.com/2019/12/10/you-could-be-sabotaging-your-long-term-goals-with-these-money-moves.html
8. Featured in "Don't save too little, or too much." By Tammy LaGorce. *New York Times*. November 6, 2019. https://www.nytimes.com/2019/11/06/your-money/retirement-savings.html
9. Quoted in "The new way to finally stop fighting over money with your spouse." By Belinda Luscombe. October 31, 2019. https://time.com/5714759/marriage-financial-struggles-solutions/
10. Quoted in A simple trick to reset your post baby budget. By Taylor Tepper. New York Times, September 25, 19. https://parenting.nytimes.com/work-money/new-baby-budget
11. Quoted in "Clean out your 'financial junk drawer' and finish those money goals for the new year." By Jill Cornfield. CNBC, December 21, 2018. https://www.cnbc.com/2018/12/20/how-to-sort-through-your-financial-junk-drawer-and-have-more-money-in-2019.html
12. Quoted in "Learn how to be a better listener to strengthen bonds with clients." By Morey Stettner. Investor Business Daily, November 26, 2018. https://www.investors.com/news/management/financial-advisor-briefing/learn-how-to-be-a-better-listener-strengthen-bonds-with-clients/

Selected Honors and Awards

- Outstanding Journal Article Award, Association for Financial Counseling and Planning Education. (2020)
- National Endowment of Financial Education Research to Practice Award, Association of Financial Counseling and Planning Education, 2019.
- CFP Board Pro Bono Service Award, Award given to UGA Financial Planning, 2019.
- Distinguished Alumna Award, College of Human Sciences, Oklahoma State University, 2013
- Myers-Alford Outstanding Teaching Award, College of Human Ecology, Kansas State University, 2013.