

# Lu Fan, Ph.D., CFP®

✉ [lufan@uga.edu](mailto:lufan@uga.edu)

🌐 <https://sites.google.com/view/lu-fan>

☎ (706) 542-4655

🏠 Dawson Hall, 305 Sanford Drive, Athens, GA 30602

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**APPOINTMENT**      **Assistant Professor, The University of Georgia, Athens, GA**      2022–Present  
*Department of Financial Planning, Housing and Consumer Economics*

**Assistant Professor, University of Missouri, Columbia, MO**      2017–2021  
*Program of Personal Financial Planning*

**EDUCATION**      **The University of Georgia, Athens, GA**  
*Ph.D., Financial Planning, Housing and Consumer Economics*      2017  
*M.A., Journalism and Mass Communication (Advertising Concentration)*      2012

**Capital University of Economics and Business, Beijing, China**  
*B.A., Communications*      2009

**RESEARCH**      *Publications:*

22. Zhang, Y., & **Fan, L.** (*Accepted*). Financial capability, financial education, and student loan debt: Expected and unexpected results. *Journal of Financial Counseling and Planning*.
21. **Fan, L.**, & Lim, H. (*Accepted*). Cognitive abilities and seeking financial advice: Differences in advice sources. *Journal of Financial Counseling and Planning*.
20. Ryu, S., & **Fan, L.** (2022). The relationship between financial worries and psychological distress among U.S. adults. *Journal of Family and Economic Issues*. <https://doi.org/10.1007/s10834-022-09820-9>
19. **Fan, L.** (2022). Mobile investment technology adoption among investors. *International Journal of Bank Marketing*, 40, (1), 50-67. <https://doi.org/10.1108/IJBM-11-2020-0551>
18. **Fan, L.**, Lim, H., & Lee, J. M. (2021). Young adults' financial advice-seeking behavior: The roles of parental financial socialization and personality traits. *Family Relations*. <https://doi.org/10.1111/fare.12625>
17. **Fan, L.**, & Henager, R. (2021). A structural determinants framework for financial well-being. *Journal of Family and Economic Issues*. <https://doi.org/10.1007/s10834-021-09798-w>
16. **Fan, L.**, Stebbins, R. & Kim, K. T. (2021). Skint, retirement? Financial hardship and retirement planning behaviors. *Journal of Family and Economic Issues*. <https://doi.org/10.1007/s10834-021-09779-z>
15. Chatterjee, S., & **Fan, L.** (2021). Older adults' life satisfaction: The roles of seeking financial advice and personality traits. *Journal of Financial Therapy*, 12(1), 51-78. <https://newprairiepress.org/jft/vol12/iss1/4/>
14. **Fan, L.**, Chatterjee, S., & Kim, J. (2021). An integrated framework of young adults' subjective well-being: The roles of personality traits, financial responsibility and perceived capability, and race. *Journal of Family and Economic Issues*. <https://doi.org/10.1007/s10834-021-09764-6>
13. **Fan, L.**, & Zhang, L. (2021). The influence of financial education sources on emergency savings: The role of financial literacy. *Family and Consumer Sciences Research Journal*, 49(4), 344-361. <https://doi.org/10.1111/fcsr.12400>
12. **Fan, L.**, & Park, N. (2021). Factors mediating the association between financial socialization and well-being of young adults: Testing a conceptual framework. *Journal of Financial Counseling and Planning*. <https://doi.org/10.1891/JFCP-20-00056>

11. **Fan, L.** (2021). Information search, financial advice use, and consumer financial behavior. *Journal of Financial Counseling and Planning*, 32(1), 21-34. <https://doi.org/10.1891/JFCP-18-00086>.
10. **Fan, L.** (2021). A conceptual framework of financial advice-seeking and short- and long-term financial behaviors: An age comparison. *Journal of Family and Economic Issues*, 42, 90-112. <https://doi.org/10.1007/s10834-020-09727-3>.
9. Chatterjee, S., **Fan, L.**, Ryu, S., & Kim, J. (2020). A decade review of Asian studies in the Journal of Family and Economic Issues from 2010 to 2019. *Journal of Family and Economic Issues*. <https://doi.org/10.1007/s10834-020-09735-3>.
8. **Fan, L.**, & Chatterjee, S. (2020). The utilization of robo-advisors by individual investors: An analysis using diffusion of innovation and information search frameworks. *Journal of Financial Counseling and Planning*, 31(1), 130-145. <https://doi.org/10.1891/jfcp-18-00078>.
7. **Fan, L.**, & Chatterjee, S. (2019). Bequest expectations among U.S. older adults: The roles of generational differences and personality traits. *Financial Planning Review*, 2(3-4), 130-145, e1057. <https://doi.org/10.1002/cfp2.1057>.
6. **Fan, L.**, & Babiarz, P. (2019). The determinants of subjective financial satisfaction and the moderating roles of gender and marital status. *Family and Consumer Sciences Research Journal*, 47(3), 237-259. <http://dx.doi.org/10.1111/fcsr.12297>.
5. **Fan, L.**, & Chatterjee, S. (2019). Financial socialization, financial education, and student loan debt. *Journal of Family and Economic Issues*, 40(1), 74-85. <https://doi.org/10.1007/s10834-018-9589-0>.
4. **Fan, L.**, & Chatterjee, S. (2018). Application of situational stimuli for examining the effectiveness of financial education: A behavioral finance perspective. *Journal of Behavioral and Experimental Finance*, 17, 68-75. <https://doi.org/10.1016/j.jbef.2017.12.009>.
3. Chatterjee, S., & **Fan, L.** (2017). Household demand for private long-term care insurance: An exploratory note. *Economics Bulletin*, 37(3), 1975-1981. <http://www.accessecon.com/Pubs/EB/2017/Volume37/EB-17-V37-I3-P178.pdf>.
2. **Fan, L.**, & Chatterjee, S. (2017). Borrowing decisions of households: An examination of the information search process. *Journal of Financial Counseling and Planning*, 28(1), 95-106. <http://dx.doi.org/10.1891/1052-3073.28.1.95>.
1. Chatterjee, S., **Fan, L.**, Jacobs, B., & Haas, R. (2017). Risk tolerance and goals-based savings behavior of households: The role of financial literacy. *Journal of Personal Finance*, 16(1), 66-77. [https://issuu.com/iarfcregister/docs/journal\\_of\\_personal\\_finance\\_spring\\_](https://issuu.com/iarfcregister/docs/journal_of_personal_finance_spring_).

#### Book Chapter:

1. **Fan, L.** (2022). The use of financial advice: Consumers' financial advice-seeking. In J.E. Grable, & S. Chatterjee (Eds.), *De Gruyter Handbook of Personal Finance* (pp. 551-567). Doi: 10.1515/9783110727692-031

#### Conference Proceedings:

7. **Fan, L.**, Lim, H., & Lee, J. M. (2020). Young adults' financial advice-seeking behavior: The role of mother's involvement in financial socialization during adolescence. *Proceedings of the Association for Financial Counseling and Planning Education*. <https://www.afcpe.org/wp-content/uploads/2020/11/2020-AFCPE-Proceedings.pdf> (pp.66).
6. **Fan, L.**, & Park, N. (2020). Financial socialization and subjective well-being of Millennials. *Consumer Interests Annual*. <https://acci.memberclicks.net/assets/docs/CIA/CIA2020/FanLuCIA2020.pdf>
5. **Fan, L.**, & Lim, H. (2019). The relationship between cognitive abilities and financial help-seeking behavior. *Proceedings of the Association for Financial Counseling and Planning Education*. [https://www.afcpe.org/wp-content/uploads/2021/02/AFCPE-Proceedings\\_2019\\_FINALv2.pdf](https://www.afcpe.org/wp-content/uploads/2021/02/AFCPE-Proceedings_2019_FINALv2.pdf) (pp.179).

4. **Fan, L.**, Zhang, L. & Zhao, H. (2018). Who needs a financial advisor? The roles of investment confidence and knowledge in investors' financial decision-making. *Proceedings of the Association for Financial Counseling and Planning Education*. [https://www.afcpe.org/wp-content/uploads/2019/05/2018-AFCPE-Proceedings\\_Final.pdf](https://www.afcpe.org/wp-content/uploads/2019/05/2018-AFCPE-Proceedings_Final.pdf) (pp.26).
3. **Fan, L.**, & Chatterjee, S. (2018). An information search perspective of financial help-seeking behavior. *Consumer Interests Annual*. <https://www.consumerinterests.org/assets/docs/CIA/CIA2018/FanCIA18.pdf>
2. **Fan, L.**, & Chatterjee, S. (2017). An examination of the effectiveness of financial education under situational stimuli: A behavioral finance perspective. *Consumer Interests Annual*. <https://www.consumerinterests.org/assets/docs/CIA/CIA2017/cia%202107%20fan%20chatterjee%20op.pdf>
1. **Fan, L.**, & Babiarz, P. (2015). The relationship between financial satisfaction and marital status of U.S. women. *Consumer Interests Annual*. <https://www.consumerinterests.org/assets/docs/CIA/CIA2015/D2a%20Fan%20Babiarz.pdf>

**Research Presentations:**

*Presenter(s) are underlined; \*Denotes doctoral student contributor*

32. **Fan, L.**, & Henager, R. (2022). Generational differences in financial well-being: What have we learned about the roles of financial knowledge, skill, and behavior? *American Council on Consumer Interests*, Virtual.
31. Lim, H., Lee, J. M., & **Fan, L.**(2022). Retirement status change, social support, and life satisfaction among older adults. *American Council on Consumer Interests*, Clearwater Beach, FL.
30. Pak, T.-Y., **Fan, L.**, & Chatterjee, S. (2022). Financial literacy and behavior as mediators of the relationship between financial socialization and financial well-being. *American Council on Consumer Interests*, Clearwater Beach, FL.
29. Zhang, Y.\*, & **Fan, L.** (2022). How financial stress factors are associated with mobile fintech adoption? *American Council on Consumer Interests*, Clearwater Beach, FL.
28. Ryu, S.\*, & **Fan, L.**(2021). The moderating effects of socio-demographic factors on the relationship between financial worries and psychological distress among U.S. adults [Poster]. *American Public Health Association Annual Meeting*, Virtual.
27. Ryu, S.\*, & **Fan, L.**(2021). The moderating role of marriage for the relationship between financial worries and psychological distress [Poster]. *National Council on Family Relations*, Virtual.
26. **Fan, L.**, & Henager, R. (2021). A structural determinants framework for financial well-being. *American Council on Consumer Interests*, Virtual.
25. Lim, H., & **Fan, L.** (2021). Roles of perceived and experienced social mobility in the relationship between materialism and life satisfaction. *American Council on Consumer Interests*, Virtual.
24. Zhang, Y.\*, & **Fan, L.** (2021). The determinants of student loan behaviors, stress, and satisfaction. *American Council on Consumer Interests*, Virtual. [**National Endowment for Financial Education Best Paper Award**]
23. Stebbins, R., Kim, K. T., & **Fan, L.** (2021). Is ignorance bliss? Investment literacy and financial market trust. *American Council on Consumer Interests*, Virtual.
22. **Fan, L.** (2021). Classroom digital technology use in financial planning and related disciplines. *University of Missouri System Teaching Scholars Program Spring Conference*, Virtual.
21. **Fan, L.**, Lim, H., & Lee, J. M. (2020). Young adults' financial advice-seeking behavior: The role of mother's involvement in financial socialization during adolescence. *Association for Financial Counseling and Planning Education*, Virtual.
20. **Fan, L.**, & Park, N. (2020). Financial socialization and subjective well-being of Millennials. *American Council on Consumer Interests*, Virtual.

19. Fan, L., & Chatterjee, S. (2020). Financial help-seeking behavior and life satisfaction among the U.S. elderly: The roles of personality, cognitive ability, and risk tolerance. *CFP® Board Academic Research Colloquium*, Arlington, VA.
18. Fan, L., & Lim, H. (2020). The relationship between cognitive abilities and financial help-seeking behavior. *Association for Financial Counseling and Planning Education*, Portland, OR. [**Outstanding Symposium Research Paper Award**]
17. Park, N., & Fan, L. (2019). Examining the alternative financial service use among Millennials using the IMB model [Poster]. *Academy of Financial Services*, Minneapolis, MN.
16. Fan, L., Chatterjee, S., & Kim, J. (2019). An examination of young adults' subjective well-being: The effects of personality, financial ability, and financial independence. *American Council on Consumer Interests*, Arlington, VA.
15. Cheng, G.\*, & Fan, L. (2019). Estate planning preparedness among older adults: A closer look at will and trust adoptions [Poster]. *American Council on Consumer Interests*, Arlington, VA.
14. Fan, L., Chatterjee, S., & Kim, J. (2019). Relationships among financial ability, financial independence, and well-being of emerging adults: Does personality matter? *CFP® Board Academic Research Colloquium*, Arlington, VA.
13. Fan, L., Zhang, L., & Zhao, H. (2018). Who needs a financial advisor? The roles of investment confidence and knowledge in investors' financial decision-making. *Association for Financial Counseling and Planning Education*, Norfolk, VA.
12. Fan, L., & Chatterjee, S. (2020). An examination of the influence of robo-advisers, online financial services, and other information sources on investment styles. *Academy of Financial Services*, Chicago, IL.
11. Fan, L., & Zhang, L. (2018). Do sources of financial education affect financial knowledge and financial confidence [Poster]. *Academy of Financial Services*, Chicago, IL.
10. Fan, L., & Chatterjee, S. (2018). An information search perspective of financial help-seeking behavior. *American Council on Consumer Interests*, Clearwater Beach, FL.
9. Fan, L., & Chatterjee, S. (2018). The age and gender effects on a conceptual framework of household financial help-seeking behavior. *CFP® Board Academic Research Colloquium*, Arlington, VA.
8. Fan, L., & Chatterjee, S. (2017). The effect of financial socialization on student loan debt behavior. *Financial Therapy Association*, San Diego, CA.
7. Fan, L., & Chatterjee, S. (2017). An examination of the effectiveness of financial education under situational stimuli from a behavioral finance perspective. *American Council on Consumer Interests*, Albuquerque, NM. [**National Endowment for Financial Education Best Paper Award**]
6. Fan, L., & Chatterjee, S. (2017). Financial wealth, perceived health, and bequest motive: does personality type matter? *CFP® Board Academic Research Colloquium*, Arlington, VA.
5. Fan, L., & Chatterjee, S. (2016). The relationship between personality types, risk tolerance, and portfolio allocation [Poster]. *Academy of Financial Services*, Las Vegas, NV.
4. Fan, L., & Chatterjee, S. (2016). Personality type and bequest motive among the elderly [Poster]. *American Council on Consumer Interests*, Arlington, VA.
3. Fan, L., Chatterjee, S., Jacobs, H., & Woodyard, A. (2015). The demand for private long-term care insurance. *Association for Financial Counseling and Planning Education*, Jacksonville, FL.
2. Fan, L., & Babiarz, P. (2015). The relationship between financial satisfaction and marital status of U.S. women. *American Council on Consumer Interests*, Clearwater Beach, FL.
1. Fan, L., & Chatterjee, S. (2014). Borrowing decisions of households: The role of information search, financial literacy and financial help seeking behavior [Poster]. *Financial Therapy Association*, Nashville, TN.

**Invited Seminar Presentations:**

3. **Fan, L.** (2021). Consumer financial advice-seeking. *Department of Financial Planning, Housing and Consumer Economic Research Seminar, University of Georgia.*
2. **Fan, L.** (2019). Financial responsibility, perceived financial ability, and subjective well-being of young adults. *Department of Personal Financial Planning Doctoral Research Seminar, Kansas State University.*
1. **Fan, L.** (2018). An information search perspective of financial advice-seeking and financial management behavior. *Department of Political Economy Research Seminar, University of International Business and Economics, Beijing, China.*

**HONORS &  
AWARDS**

<b>National Endowment for Financial Education Best Paper Award</b>	2021
American Council on Consumer Interests <i>Title:</i> The determinants of student loan behaviors, stress, and satisfaction <i>Second Author;</i> Co-Author: Yu Zhang (University of Georgia)	
<b>Hazel M. Hatcher HES Teaching Scholar Award</b>	2021
College of Human Environmental Sciences, University of Missouri	
<b>Undergraduate Student Poster Competition 2nd Place Award</b>	2020
American Council on Consumer Interests <i>Title:</i> Mobile and Online Investment technology adoption among U.S investors <i>Faculty Advisor &amp; Co-Author;</i> Undergraduate Advisee: Taohua Wen	
<b>Outstanding Symposium Research Paper Award</b>	2019
Association for Financial Counseling and Planning Education <i>Title:</i> The relationship between cognitive abilities and financial help-seeking behavior <i>Leading Author;</i> Co-Author: HanNa Lim (Kansas State University)	
<b>National Endowment for Financial Education Best Paper Award</b>	2017
American Council on Consumer Interests <i>Title:</i> An examination of the effectiveness of financial education under situational stimuli from a behavioral finance perspective <i>Leading Author;</i> Co-Author: Swarn Chatterjee (University of Georgia)	
<b>Outstanding Teaching Assistant Award</b>	2017
Graduate School, University of Georgia	
<b>Summer Research Fellowship</b>	2017
Graduate School, University of Georgia	
<b>ANC Scholar Award &amp; NAGDCA Conference Travel Award</b>	2016
Arthur N. Caple Foundation	
<b>Graduate School Travel Scholarships</b>	2015 & 2017
Graduate School, University of Georgia	
<b>Virginia Wilbanks Kilgore Scholarship</b>	2015–2016
College of Family and Consumer Sciences, University of Georgia	
<b>NEAFCS Marketing Package Award (Team Award)</b>	2015
National Extension Association of Family and Consumer Sciences <i>Graduate Assistant Contributor</i> <i>Supervisor:</i> Pamela Turner (University of Georgia)	
<b>ACCI Student/Young Professional Conference Scholarship</b>	2015
American Council on Consumer Interests	
<b>Betty Lane Graduate Scholarship</b>	2014–2015
College of Family and Consumer Sciences, University of Georgia	
<b>AFCPE Symposium Scholarship</b>	2014
Association for Financial Counseling and Planning Education	
<b>GRANTS/ FUNDING</b>	
<b>Agricultural Experiment Station (AES) Funding</b>	2020–2021
College of Agriculture, Food and Natural Resources College of Human Environmental Sciences	

*Project Title:* Financial information- and help-seeking behavior, financial capability, and well-being

*Role:* PI

*Amount:* \$23,991

**Program for Undergraduate Research Experience Award** 2020–2021

College of Human Environmental Sciences, University of Missouri

*Project Title:* The adoption of FinTech among U.S. investors

*Role:* Faculty Mentor & Advisor

*Undergraduate Student Advisee:* Taohua Wen (University of Missouri)

*Amount:* \$1,500

**HES IDEAS Lab Fund** 2019–2021

College of Human Environmental Sciences, University of Missouri

*Project Title:* Gender inequality in intra-household financial decision responsibility of young low-income women

*Role:* PI

*Co-PI:* Li Zhao (University of Missouri)

*Amount:* \$2,000

**Online Teaching Foundations** 2019

Course Design and Technology, University of Missouri

*Amount:* \$500

**Program for Undergraduate Research Experience Award** 2019

College of Human Environmental Sciences, University of Missouri

*Project Title:* An analysis of household retirement behavior

*Role:* Faculty Mentor & Advisor

*Undergraduate Student Advisee:* Yaqi Fang (University of Missouri)

*Amount:* \$1,500

**Margaret W. Mangel Faculty Research Catalyst Fund** 2019–2020

College of Human Environmental Sciences, University of Missouri

*Project Title:* Antecedents of financial information processing of young adults

*Role:* PI

*Amount:* \$3,000

**HES Grant Writing Institute** 2018

College of Human Environmental Sciences, University of Missouri

*Role:* PI

*Amount:* \$500

**Summer Doctoral Research Fellowship** 2017

University of Georgia Graduate School

*Project Title:* The influences of financial help-seeking and other information sources on consumer's financial management behavior

*Role:* PI

*Amount:* \$3,500

**Jan M. Hathcote Social Science Academic Support Fund** 2015–2016

College of Family and Consumer Sciences, University of Georgia

*Project Title:* Financial literacy, emotions, and the effectiveness of financial education: an experimental approach

*Role:* PI

*Amount:* \$1,800

**TEACHING**

**The University of Georgia:**

**Since 2022**

FHCE 6205 Advanced Wealth Management II

***Student Advising***

*Committee Member*

Ph.D. Program, Yingyi (Travy) Liu, In Progress (Spring 2022– )

**2013–2017**

*Graduate Instructor*

FHCE 3260 Computer Applications in Financial Planning

FHCE 3000 Family Resource Management

*Graduate Assistant*

FHCE 3000 Family Resource Management

FHCE 3100 Introductory Consumer Economics

FHCE 3110 Money Skills for Life

FHCE 3150E Consumer Decision Making (Online)

FHCE 3200/3200E Introduction to Personal Finance (Online & On-Site)

FHCE 4900 Professional Seminar and Internship Orientation

FHCE 5900 Professionalism and Career Readiness

FHCE 5910 Financial Planning, Housing and Consumer Economics Internship

*Graduate Subject Tutor (UGA Student Athletic Association Academic Services)*

FHCE 2100 Family Economic Issues through the Life Course

FHCE 3150 Consumer Decision Making

FHCE 4000 Consumer Analytics and Research Method

FHCE 4210 Retirement Planning and Employee Benefit

FHCE 4250 Practice Management in Financial Planning

*University of Missouri:*

**2017–2021**

FinPln 3283 Financial Planning: Computer Application

FinPln 4383/7383 Investment Management

FinPln 4393/7393 Estate and Gift Planning

FinPln 7960 Readings in Household Economics and Finance

FinPln 8001 Theories in Investment Management

FinPln 8085 Problems in Household Economics and Finance

FinPln 8090 Master's Thesis Research in Personal Financial Planning

FinPln 8500 Personal Financial Planning Capstone

***Student Advising***

*Chair*

M.S. Thesis Track, Yu Zhang, Graduated Fall 2019 (Fall 2018–Fall 2019)

*Thesis Title:* The determinants of student loan behaviors, stress, and satisfaction

M.S. Applied Track, Michael Roarty (Spring 2021–Fall 2021 )

M.S. Applied Track, Kai Bo (Spring 2021–Fall 2021)

M.S. Applied Track, Nicole Muenz, Graduated (Fall 2019–Spring 2021)

M.S. Applied Track, Yilin Wang, Graduated Fall 2019 (Fall 2018–Fall 2019)

*Committee Member*<sup>^</sup>

Ph.D. Program, Yvonne Hampton (Spring 2018–Fall 2021)

Ph.D. Program, Danni Wang, Discontinued (Fall 2019–Spring 2021)

Ph.D. Program, Xihao Huang, Discontinued (Spring 2018–Spring 2020)

Ph.D. Program, Chen Xu, Graduated Fall 2019 (Spring 2018–Fall 2019)

Ph.D. Program, Guopeng Cheng, Graduated Summer 2019 (Fall 2017–Spring 2019)

M.S. Applied Track, Zhaoyue Gao, Graduated Fall 2020

M.S. Applied Track, Zhihao Wang, Graduated Fall 2020

M.S. Applied Track, Yue Zhang, Graduated Fall 2019

M.S. Applied Track, Christina Wang, Graduated Spring 2019

<sup>^</sup>Also serve as GPIDEA MS Program Committee Member

**SERVICE**

*Leadership Service:*

**Board Member**

2020–2022

<i>Board of Directors, Academy of Financial Services</i>	
<b>Editor</b> , Consumer Annual Interest ( <i>Conference Proceeding</i> )	2020–2021
<i>American Council on Consumer Interests</i>	
<b>Editorial Board Member</b>	
<i>Journal of Financial Counseling and Planning</i>	2022–Present
<i>Journal of Personal Finance</i>	2021–Present
<b>Chair</b> , Conference Planning Committee	2021–2022
<i>American Council on Consumer Interests</i>	
<b>Chair</b> , Conference Scholarship Award Committee	2020–Present
<i>American Council on Consumer Interests</i>	

**Other Professional Service:**

<b>Grant proposal reviewer</b>	2021
<i>American Council on Consumer Interests</i>	
<b>Committee Member</b> , Conference Planning Committee	2020–Present
<i>American Council on Consumer Interests</i>	
<b>Grant Proposal Reviewer</b>	2019–2020
<i>Association for Financial Counseling &amp; Planning Education</i>	
<b>Conference Presider</b>	2019, 2021
<i>Association for Financial Counseling &amp; Planning Education</i>	
<b>Fellowship Application Reviewer</b>	2019
<i>Association for Financial Counseling &amp; Planning Education</i>	
<b>Conference Discussant</b>	2019–2020
<i>CFP® Board Academic Research Colloquium</i>	

**University/College Service:**

<b>Faculty Reviewer</b> , Graduate Fellowship Competition	2019–Present
<i>University of Missouri</i>	
<b>Committee Member</b> , Faculty Council on College Policy	2020–Present
<i>College of Human Environmental Sciences, University of Missouri</i>	
<b>Committee Member</b> , Graduate Awards and Fellowships Committee	2018–Present
<i>College of Human Environmental Sciences, University of Missouri</i>	
<b>Volunteer Income Tax Assistance</b>	2014–2015
<i>International Tax Assistance Program, University of Georgia</i>	

**Departmental Service:**

<b>Member</b> , Working Group for Graduate Programs	2021–Present
<i>Department of Personal Financial Planning, University of Missouri</i>	
<b>Member</b> , Working Group for CFP® Board Undergrad/Grad Courses	2021–Present
<i>Department of Personal Financial Planning, University of Missouri</i>	
<b>Chair</b> , Graduate Scholarship Committee	2019–Present
<i>Department of Personal Financial Planning, University of Missouri</i>	
<b>Committee Member</b> , Undergraduate Scholarship Committee	2020–Present
<i>Department of Personal Financial Planning, University of Missouri</i>	
<b>Committee Member</b> , Student Competition Committee	2017–Present
<i>Department of Personal Financial Planning, University of Missouri</i>	
<b>Undergraduate Research Mentor</b> , HES–P.U.R.E. Program	2019–Present
<i>Department of Personal Financial Planning, University of Missouri</i>	
<b>Faculty Coordinator &amp; Mentor</b> , Edward Jones Portfolio Challenge	2017–2019
<i>Total Student Award: \$15,000</i>	
<i>Department of Personal Financial Planning, University of Missouri</i>	
<b>Student Representative</b> , Advisory Committee	2015–2017
<i>Consumer Economics Program at Athens Technical College &amp; Financial Planning, Housing and Consumer Economic, University of Georgia</i>	



**Editorial Service:**

**Peer Review for Journals**

Journal of Financial Counseling and Planning  
 Journal of Economic Psychology  
 Journal of Family and Economic Issues  
 Journal of Consumer Affairs  
 Family & Consumer Sciences Research Journal  
 Journal of Financial Therapy  
 Journal of Financial Planning  
 Journal of Financial Services Marketing  
 North American Journal of Economics and Finance  
 Financial Innovation

**Peer Review for Conferences**

CFP® Board Academic Research Colloquium  
 American Council on Consumer Interests  
 Association for Financial Counseling & Planning Education  
 International Federation for Home Economics  
 Academy of Marketing Science Conference

<b>CERTIFICATE</b>	<b>CERTIFIED FINANCIAL PLANNER™</b> <i>Certified Financial Planner Board of Standards</i>	Since 2018
<b>PROFESSIONAL DEVELOPMENT</b>	<b>MentorUp - Graduate Faculty Mentor Training [Completion Certificate]</b> <i>Graduate School, University of Missouri</i>	08/2021
	<b>Introduction to Python for Data Analysis [Completion Certificate]</b> <i>Statistical Horizons</i>	05/2021
	<b>UM System Teaching Scholars Program</b> <i>University of Missouri System</i>	08/2020–05/2021
	<b>Introduction to Social Network Analysis [Completion Certificate]</b> <i>Statistical Horizons</i>	03/2021
	<b>Center for Health Longevity Ideas Lab</b> <i>MU Center for Health Longevity, University of Missouri System</i>	03/2021
	<b>Excellence in Online Teaching [Completion Certificate]</b> <i>Online Teaching Certificate Seminar</i> <i>Office of eLearning, University of Missouri System</i>	06–08/2020
	<b>Keep Learning Workshop Series</b> <i>Online and Remote Teaching Training, University of Missouri System</i>	06–08/2020
	<b>Inclusive Teaching Online Workshop</b> <i>Teaching for Learning Center, University of Missouri</i>	03/2020
	<b>Fundamentals of Being a Principal Investigator Workshop</b> <i>Office of Research and Economic Development, University of Missouri</i>	01/2020
	<b>Annual Teaching Renewal Week Conference</b> <i>Teaching for Learning Center, University of Missouri</i>	01/2020
	<b>Online Teaching Foundations [Completion Certificate]</b> <i>Course Design &amp; Technology, University of Missouri</i>	08–12/2019
	<b>Research Development Series Workshop</b> <i>Office of Research Advancement &amp; The Connector, University of Missouri</i>	08–12/2019
	<b>Teaching Academy</b> <i>Teaching for Learning Center, University of Missouri</i>	09/2019
	<b>Broader Impacts Writing Workshop</b> <i>The Connector, University of Missouri</i>	03/2019
	<b>Intensive Open Educational Resources (OER) Training</b> <i>The University of Missouri System</i>	10/2018

<b>Faculty Grant Writing Institute</b>	07/2018
<i>College of Human Environmental Sciences, University of Missouri</i>	
<b>Introduction to the Health and Retirement Study (HRS) Workshop</b>	06/2018
<i>Summer Institute in Survey Research Techniques, University of Michigan</i>	
<b>Managing Big Data with MySQL [Completion Certificate]</b>	06/2016
<i>Coursera</i>	
<b>R Programming [Completion Certificate]</b>	10/2015
<i>Coursera</i>	
<b>Graduate Teaching Seminar</b>	08–12/2013
<i>Graduate School, University of Georgia</i>	

**PROFESSIONAL  
AFFILIATIONS**

Certified Financial Planner Board of Standards  
American Council on Consumer Interests  
Association for Financial Counseling & Planning Education  
Academy of Financial Services  
National Council on Family Relations