

Lu Fan, Ph.D., CFP®

✉ lufan@uga.edu

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

☎ (706) 542-4655

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

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:*

25. **Fan, L.** (*In Press*). Consumer financial information processing: An integrated approach to examine individual differences. *International Journal of Consumer Studies*. <https://doi.org/10.1111/ijcs.12859>
24. **Fan, L.**, Chatterjee, S., & Kim, J. (*In Press*). Young adults' personality traits and subjective well-being: The role of perceived money management capability. *Journal of Behavioral and Experimental Finance*. <https://doi.org/10.1016/j.jbef.2022.100689>
23. Pak, T.-Y., & **Fan, L.** (*In Press*). Childhood experience of parental affection and financial well-being in later life: Evidence from the Health and Retirement Study. *Journal of Consumer Affairs*. <https://doi.org/10.1111/joca.12463>
22. Zhang, Y., & **Fan, L.** (2022). Financial capability, financial education, and student loan debt: Expected and unexpected results. *Journal of Financial Counseling and Planning*. <https://doi.org/10.1891/JFCP-2021-0039>
21. **Fan, L.**, & Lim, H. (2022). Cognitive abilities and seeking financial advice: Differences in advice sources. *Journal of Financial Counseling and Planning*, 33(1), 97-114. <https://doi.org/10.1891/JFCP-19-00079>
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.**, Chatterjee, S., & Kim, J. (2022). 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*, 43, 66-85. <https://doi.org/10.1007/s10834-021-09764-6>
17. **Fan, L.**, Lim, H., & Lee, J. M. (2022). Young adults' financial advice-seeking behavior: The roles of parental financial socialization and personality traits. *Family Relations*, 71(3), 1226-1246. <https://doi.org/10.1111/fare.12625>
16. **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>

15. **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>
14. 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/>
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*, 32(2), 202-216. <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. (2021). A decade review of Asian studies in the Journal of Family and Economic Issues from 2010 to 2019. *Journal of Family and Economic Issues*, 42, 178-194. <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_.

Book Chapters:

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 (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 (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*

33. **Fan, L.**, & Ryu, S. (Accepted). Young women financial empowerment in household financial decisions: Does it improve financial satisfaction? *National Council on Family Relations*, Minneapolis, MN.
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*, Clearwater Beach, FL.
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**

Emerging Scholar Award	2022
American Association of Family and Consumer Sciences	
Richard L. D. Morse Early-Career Award	2022
American Council on Consumer Interest	
National Endowment for Financial Education Best Paper Award	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)	
Hazel M. Hatcher HES Teaching Scholar Award	2021
College of Human Environmental Sciences, University of Missouri	
Undergraduate Student Poster Competition 2nd Place Award	2020
American Council on Consumer Interests	
<i>Title:</i> Mobile and Online Investment technology adoption among U.S investors	
<i>Faculty Advisor & Co-Author;</i> Undergraduate Advisee: Taohua Wen	
Outstanding Symposium Research Paper Award	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)	
National Endowment for Financial Education Best Paper Award	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)	
Outstanding Teaching Assistant Award	2017
Graduate School, University of Georgia	
Summer Research Fellowship	2017
Graduate School, University of Georgia	

	ANC Scholar Award & NAGDCA Conference Travel Award	2016
	Arthur N. Caple Foundation	
	Graduate School Travel Scholarships	2015 & 2017
	Graduate School, University of Georgia	
	Virginia Wilbanks Kilgore Scholarship	2015–2016
	College of Family and Consumer Sciences, University of Georgia	
	NEAFCS Marketing Package Award (Team Award)	2015
	National Extension Association of Family and Consumer Sciences	
	<i>Graduate Assistant Contributor</i>	
	<i>Supervisor:</i> Pamela Turner (University of Georgia)	
	ACCI Student/Young Professional Conference Scholarship	2015
	American Council on Consumer Interests	
	Betty Lane Graduate Scholarship	2014–2015
	College of Family and Consumer Sciences, University of Georgia	
	AFCPE Symposium Scholarship	2014
	Association for Financial Counseling and Planning Education	
GRANTS/ FUNDING	Financial Education Database Training Fellowship	2022
	NEFE/Knology	
	<i>Role:</i> PI	
	<i>Amount:</i> \$5,000	
	Agricultural Experiment Station (AES) Funding	2020–2021
	College of Agriculture, Food and Natural Resources	
	College of Human Environmental Sciences	
	<i>Project Title:</i> Financial information- and help-seeking behavior, financial capability, and well-being	
	<i>Role:</i> PI	
	<i>Amount:</i> \$23,991	
	Program for Undergraduate Research Experience Award	2020–2021
	College of Human Environmental Sciences, University of Missouri	
	<i>Project Title:</i> The adoption of FinTech among U.S. investors	
	<i>Role:</i> Faculty Mentor & Advisor	
	<i>Undergraduate Student Advisee:</i> Taohua Wen (University of Missouri)	
	<i>Amount:</i> \$1,500	
	HES IDEAS Lab Fund	2019–2021
	College of Human Environmental Sciences, University of Missouri	
	<i>Project Title:</i> Gender inequality in intra-household financial decision responsibility of young low-income women	
	<i>Role:</i> PI	
	<i>Co-PI:</i> Li Zhao (University of Missouri)	
	<i>Amount:</i> \$2,000	
	Online Teaching Foundations	2019
	Course Design and Technology, University of Missouri	
	<i>Amount:</i> \$500	
	Program for Undergraduate Research Experience Award	2019
	College of Human Environmental Sciences, University of Missouri	
	<i>Project Title:</i> An analysis of household retirement behavior	
	<i>Role:</i> Faculty Mentor & Advisor	
	<i>Undergraduate Student Advisee:</i> Yaqi Fang (University of Missouri)	
	<i>Amount:</i> \$1,500	
	Margaret W. Mangel Faculty Research Catalyst Fund	2019–2020
	College of Human Environmental Sciences, University of Missouri	
	<i>Project Title:</i> Antecedents of financial information processing of young adults	
	<i>Role:</i> PI	
	<i>Amount:</i> \$3,000	

HES Grant Writing Institute	2018
College of Human Environmental Sciences, University of Missouri	
<i>Role:</i> PI	
<i>Amount:</i> \$500	
Summer Doctoral Research Fellowship	2017
University of Georgia Graduate School	
<i>Project Title:</i> The influences of financial help-seeking and other information sources on consumer's financial management behavior	
<i>Role:</i> PI	
<i>Amount:</i> \$3,500	
Jan M. Hathcote Social Science Academic Support Fund	2015–2016
College of Family and Consumer Sciences, University of Georgia	
<i>Project Title:</i> Financial literacy, emotions, and the effectiveness of financial education: an experimental approach	
<i>Role:</i> PI	
<i>Amount:</i> \$1,800	

TEACHING

The University of Georgia:

Since 2022

FYOS 1001 Consumer and Money Skill for College Life
 FHCE 4205 Wealth Management II
 FHCE 6205 Advanced Wealth Management II

Student Advising

Committee Member

Ph.D. Program, Yingyi (Tracy) 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 ^

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

^Also serve as GPIDEA MS Program Committee Member

SERVICE

Leadership Service:

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

Other Professional Service:

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

University/College Service:

Faculty Advisory Committee , College of Family and Consumer Sciences <i>University of Georgia</i>	2022–Present
Faculty Reviewer , Graduate Fellowship Competition <i>University of Missouri</i>	2019–Present
Committee Member , Faculty Council on College Policy <i>College of Human Environmental Sciences, University of Missouri</i>	2020–Present
Committee Member , Graduate Awards and Fellowships Committee <i>College of Human Environmental Sciences, University of Missouri</i>	2018–Present
Volunteer Income Tax Assistance <i>International Tax Assistance Program, University of Georgia</i>	2014–2015

Departmental Service:

Member , Working Group for Graduate Programs <i>Department of Personal Financial Planning, University of Missouri</i>	2021–Present
Member , Working Group for CFP® Board Undergrad/Grad Courses <i>Department of Personal Financial Planning, University of Missouri</i>	2021–Present
Chair , Graduate Scholarship Committee <i>Department of Personal Financial Planning, University of Missouri</i>	2019–Present
Committee Member , Undergraduate Scholarship Committee <i>Department of Personal Financial Planning, University of Missouri</i>	2020–Present
Committee Member , Student Competition Committee <i>Department of Personal Financial Planning, University of Missouri</i>	2017–Present
Undergraduate Research Mentor , HES–P.U.R.E. Program <i>Department of Personal Financial Planning, University of Missouri</i>	2019–Present
Faculty Coordinator & Mentor , Edward Jones Portfolio Challenge <i>Total Student Award: \$15,000</i> <i>Department of Personal Financial Planning, University of Missouri</i>	2017–2019
Student Representative , Advisory Committee <i>Consumer Economics Program at Athens Technical College &</i> <i>Financial Planning, Housing and Consumer Economic, University of Georgia</i>	2015–2017
Student Volunteer , Community Action Poverty Simulation <i>Financial Planning, Housing and Consumer Economic, University of Georgia</i>	2013–2014

Editorial Service:

Peer Review for Journals

International Journal of Bank Marketing
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 Personal Finance
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

CERTIFICATE	CERTIFIED FINANCIAL PLANNER™ <i>Certified Financial Planner Board of Standards</i>	Since 2018
PROFESSIONAL DEVELOPMENT	MentorUp - Graduate Faculty Mentor Training [Completion Certificate] <i>Graduate School, University of Missouri</i>	08/2021
	Introduction to Python for Data Analysis [Completion Certificate] <i>Statistical Horizons</i>	05/2021
	UM System Teaching Scholars Program <i>University of Missouri System</i>	08/2020–05/2021
	Introduction to Social Network Analysis [Completion Certificate] <i>Statistical Horizons</i>	03/2021
	Center for Health Longevity Ideas Lab <i>MU Center for Health Longevity, University of Missouri System</i>	03/2021
	Excellence in Online Teaching [Completion Certificate] <i>Online Teaching Certificate Seminar</i> <i>Office of eLearning, University of Missouri System</i>	06–08/2020
	Keep Learning Workshop Series <i>Online and Remote Teaching Training, University of Missouri System</i>	06–08/2020
	Inclusive Teaching Online Workshop <i>Teaching for Learning Center, University of Missouri</i>	03/2020
	Fundamentals of Being a Principal Investigator Workshop <i>Office of Research and Economic Development, University of Missouri</i>	01/2020
	Annual Teaching Renewal Week Conference <i>Teaching for Learning Center, University of Missouri</i>	01/2020
	Online Teaching Foundations [Completion Certificate] <i>Course Design & Technology, University of Missouri</i>	08–12/2019
	Research Development Series Workshop <i>Office of Research Advancement & The Connector, University of Missouri</i>	08–12/2019
	Teaching Academy <i>Teaching for Learning Center, University of Missouri</i>	09/2019
	Broader Impacts Writing Workshop <i>The Connector, University of Missouri</i>	03/2019
	Intensive Open Educational Resources (OER) Training <i>The University of Missouri System</i>	10/2018
	Faculty Grant Writing Institute <i>College of Human Environmental Sciences, University of Missouri</i>	07/2018
	Introduction to the Health and Retirement Study (HRS) Workshop <i>Summer Institute in Survey Research Techniques, University of Michigan</i>	06/2018
	Managing Big Data with MySQL [Completion Certificate] <i>Coursera</i>	06/2016
	R Programming [Completion Certificate] <i>Coursera</i>	10/2015
	Graduate Teaching Seminar <i>Graduate School, University of Georgia</i>	08–12/2013
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	