Lu Fan, Ph.D., CFP®

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(706) 542-4856
205 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
Department 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

CERTIFICATION

CERTIFIED FINANCIAL PLANNER™ — Since 2018
Certified Financial Planner Board of Standards

POSTGRADUATE AWARDS & HORNORS

Early Career Faculty Research Award — 2023
College of Family and Consumer Sciences, University of Georgia

Outstanding Symposium Research Paper Award — 2022
Association for Financial Counseling and Planning Education (AFCPE)

Financial Education Database Training Fellowship — 2022
National Endowment for Financial Education (NEFE)/Knology

Emerging Scholar Award — 2022
American Association of Family and Consumer Sciences (AAFCS)

Richard L. D. Morse Early-Career Award — 2022
American Council on Consumer Interest (ACCI)

National Endowment for Financial Education (NEFE) Best Paper Award — 2021
American Council on Consumer Interest (ACCI)

Hazel M. Hatcher HES Teaching Scholar Award — 2021
College of Human Environmental Sciences, University of Missouri

Faculty Advisor for Undergraduate Student Poster Competition Award — 2020
American Council on Consumer Interests (ACCI)

Outstanding Symposium Research Paper Award — 2019
Association for Financial Counseling and Planning Education (AFCPE)

National Endowment for Financial Education (NEFE) Best Paper Award — 2017
American Council on Consumer Interests

LEADERSHIP EXPERIENCES

Board of Directors — 2022 – Present
American Council on Consumer Interest

Board of Directors — 2020 – 2022
Academy of Financial Services

Conference Planning Committee Chair — 2021 – 2022
American Council on Consumer Interest

Editorial Board — 2022 – Present
Journal of Financial Counseling and Planning

Editorial Board — 2021 – Present
Journal of Personal Finance

Editor — 2021
Consumer Annual Interest (ACCI Conference Proceeding)

RESEARCH ***Publications***:

28. **Fan, L.**, & Lei, S. (*Accepted*). Financial well-being, family financial support, and depression of older adults in China. *International Journal of Bank Marketing.*
27. Zhang, Y., & **Fan, L.** (*Accepted*). An examination of mobile fintech utilization from a stress-coping perspective. *Journal of Financial Counseling and Planning.*
26. Chatterjee, S., & **Fan, L.** (2023). Surviving in financial advice deserts: limited access to financial advice and retirement planning behavior. *International Journal of Bank Marketing, 40*(1), 70-106. https://doi.org/10.1108/IJBM-01-2022-0022
25. **Fan, L.** (2023). Consumer financial information processing: An integrated approach to examine individual differences. *International Journal of Consumer Studies, 47*(2), 703-722. https://doi.org/10.1111/ijcs.12859
24. Ryu, S., & **Fan, L.** (2023). The relationship between financial worries and psychological distress among U.S. adults. *Journal of Family and Economic Issues, 44*, 16-33. https://doi.org/10.1007/s10834-022-09820-9
23. Pak, T.-Y., & **Fan, L.** (2022). Childhood experience of parental affection and financial well-being in later life: Evidence from the Health and Retirement Study. *Journal of Consumer Affairs, 56*(4), 1433-1453. https://doi.org/10.1111/joca.12463
22. **Fan, L.**, Chatterjee, S., & Kim, J. (2022). Young adults' personality traits and subjective well-being: The role of perceived money management capability. *Journal of Behavioral and Experimental Finance*, 35, 100689. https://doi.org/10.1016/j.jbef.2022.100689
21. Zhang, Y., & **Fan, L.** (2022). Financial capability, financial education, and student loan debt: Expected and unexpected results. *Journal of Financial Counseling and Planning, 33*(3), 324-343. https://doi.org/10.1891/JFCP-2021-0039
20. **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
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, 43*, 415-428. 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, 43*, 354-367. 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; **Denotes undergraduate student contributor*

40. **Fan, L.**, & Zeng, Y.* (Accepted). How does mandatory financial education relate to young adults' financial outcomes? A financial capability perspective. *American Council on Consumer Interests*, Las Vegas, NV.

39. Zeng, Y.*, & **Fan, L.** (Accepted). Financial education, gender, and use of alternative financial services among U.S. young adults: A multilevel approach. *American Council on Consumer Interests*, Las Vegas, NV.

38. Stebbins, R., **Fan, L.**, & Kim, K. T. (Accepted). Undesired short-term financial behaviors and COVID-19 stimulus payment usage. *American Council on Consumer Interests*, Las Vegas, NV.

37. Henager, R., Cude, B. J., & **Fan, L.** (Accepted). Financial knowledge and confidence: A methods analysis. *American Council on Consumer Interests*, Las Vegas, NV.

36. **Fan, L.** (2023). Relationship between financial education mandates and perceived financial wellness of young adults. *NEFE Research Series Webinar*, Virtual.

35. **Fan, L.**, & Ryu, S. (2022). Young women financial empowerment in household financial decisions: Does it improve financial satisfaction? [Poster] *National Council on Family Relations*, Minneapolis, MN.

34. Zhang, Y.*, & **Fan, L.** (2022). Financial inclusion through mobile fintech tools: A financial literacy and well-being perspective. *Association for Financial Counseling and Planning Education*, Orlando, FL. **[Outstanding Symposium Research Paper Award]**

33. **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.

32. 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.

31. 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.

30. Zhang, Y.*, & **Fan, L.** (2022). How financial stress factors are associated with mobile fintech adoption? *American Council on Consumer Interests*, Clearwater Beach, FL.

29. 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.

28. 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.
27. **Fan, L.**, & Henager, R. (2021). A structural determinants framework for financial well-being. *American Council on Consumer Interests*, Virtual.
26. 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.
25. 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**]
24. Stebbins, R., Kim, K. T., & **Fan, L.** (2021). Is ignorance bliss? Investment literacy and financial market trust. *American Council on Consumer Interests*, Virtual.
23. **Fan, L.** (2021). Classroom digital technology use in financial planning and related disciplines. *University of Missouri System Teaching Scholars Program Spring Conference*, Virtual.
22. **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.
21. **Fan, L.**, & Park, N. (2020). Financial socialization and subjective well-being of Millennials. *American Council on Consumer Interests*, Virtual.
20. Wen, T.**, & **Fan, L.** (2020). Online and mobile investment technology adoption among U.S. investors [Poster]. *American Council on Consumer Interests*, Virtual. [**Undergraduate Student Poster Competition Award - 2nd Place**]
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. (2018). 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.*

OTHER HONORS & AWARDS

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
Graduate Assistant Contributor
Supervisor: 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

FUNDED GRANTS & FUNDING ACTIVITIES

Air Force Personal Financial Readiness Program 2022-Present
U. S. Department of the Air Force
Role: Co-I (10%)
PI: Catherine W. O'Neal, University of Georgia
Other Co-Is: Mallory Lucier Greer, Auburn University, Allan D. Tate, University of Georgia
Amount: $546,364

State Agricultural Experimental Stations (AES) Hatch Funds 2022-2027
USDA-NIFA; University of Georgia
Project Title: Financial capability and financial well-being
Role: PI (100%)
Amount: $201,665

Financial Education Database Training Fellowship 2022
NEFE/Knology
Role: PI (100%)
Amount: $5,000

State Agricultural Experimental Stations (AES) Hatch Funds 2020–2021
USDA NIFA; University of Missouri
Project Title: Financial information- and help-seeking behavior, financial capability, and well-being
Role: PI (100%)
Amount: $35,987

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 (Univerity 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 (60 Co-PI: Li Zhao (University of Missouri)
Amount: $2,000

Online Teaching Foundations 2019
Course Design and Technology, University of Missouri
Role: PI (100%)
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 (100%)
Amount: $3,000

HES Grant Writing Institute 2018
College of Human Environmental Sciences, University of Missouri

Role: PI (100%)
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 (100%)
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 (100%)
Amount: $1,800

TEACHING

The University of Georgia:

2022–Present
FYOS 1001 Consumer and Money Skill for College Life
FHCE 4205 Wealth Management II
FHCE 6205 Advanced Wealth Management II

Student Advising
Co-Chair
Ph.D. Program, Yu (Yulia) Zhang, In Progress (Spring 2022–)
Ph.D. Program, Zongze (Victor) Li, In Progress (Fall 2022–)
Committee Member
Ph.D. Program, Yingyi (Tracy) Liu, In Progress (Spring 2022–)
Ph.D. Program, Ben Hampton, In Progress (Fall 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:

Board of Directors 2022–Present
American Council on Consumer Interests
Board of Directors 2020–2022
Academy of Financial Services
Editor
Consumer Annual Interest (*ACCI Conference Proceeding*) 2020–2021
Editorial Boards
Journal of Financial Counseling and Planning 2022–Present
Journal of Personal Finance 2021–Present
Chair
Conference Planning Committee 2021–2022
Conference Scholarship Award Committee 2020–2022
American Council on Consumer Interests

Other Professional Service:

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

University/College Service:

Faculty Advisory Committee, College of Family and Consumer Sciences 2022–Present
University of Georgia

Faculty Research Awards Committee, College of Family and Consumer Sciences 2023–Present
University of Georgia

Faculty Council on College Policy Committee 2020–2021
College of Human Environmental Sciences, University of Missouri

Graduate Awards and Fellowships Committee 2018–2021
College of Human Environmental Sciences, University of Missouri

Faculty Reviewer, Graduate Fellowship Competition 2019–2021
University of Missouri

Volunteer Income Tax Assistance 2014–2015
International Tax Assistance Program, University of Georgia

Departmental Service:

Search Committee for Lecturer in FP and CE 2023–Present
Financial Planning, Housing and Consumer Economics, University of Georgia

FP Curriculum and Professional Development Committee 2023–Present
Financial Planning, Housing and Consumer Economics, University of Georgia

Member, Working Group for Graduate Programs 2021
Department of Personal Financial Planning, University of Missouri

Member, Working Group for CFP® Board Undergrad/Grad Courses 2021
Department of Personal Financial Planning, University of Missouri

Chair, Graduate Scholarship Committee 2019–2021
Department of Personal Financial Planning, University of Missouri

Committee Member, Undergraduate Scholarship Committee 2020–2021
Department of Personal Financial Planning, University of Missouri

Committee Member, Student Competition Committee 2017–2021
Department of Personal Financial Planning, University of Missouri

Undergraduate Research Mentor, HES–P.U.R.E. Program 2019–2021
Department of Personal Financial Planning, University of Missouri

Faculty Coordinator & Mentor, Edward Jones Portfolio Challenge 2017–2019
Total Student Award: $15,000
Department of Personal Financial Planning, University of Missouri

Student Representative, Advisory Committee 2015–2017
Consumer Economics Program at Athens Technical College &
Financial Planning, Housing and Consumer Economics, University of Georgia

Student Volunteer, Community Action Poverty Simulation 2013–2014
Financial Planning, Housing and Consumer Economics, University of Georgia

Editorial Service:

Peer Review for Journals

International Journal of Consumer Studies
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

MEDIA COVERAGE

1. **Huffington Post UK and Yahoo**. (January 2023) Before your parents retire, make sure you ask about these 6 things.
2. **The Financial**. (December 2022).Planning for retirement? Good luck finding advice.
3. **Yahoo Sports** (December 2022). Alabama is a financial advice desert. Here's what that means.
4. **Forbes**. (October 2022). Should schools teach financial literacy classes?
5. **Faz.net – Finances**. (August 2022). The love of the parents pays off.
6. **WalletHub**. (March 2021). 2021's cities with the highest & lowest credit scores.
7. **EurekAlert!** (October 2018). Financial education key to reducing student loan stress.
8. **Business Minute with Kent Martin**. KTRS Radio - St. Louis, MO (October 25-26, 2018).
9. **MU News Bureau**. (October 2018). Financial education key to reducing student loan stress.
10. **The University Network**. (November 2018). How financial literacy is key to reducing student debt.

PROFESSIONAL DEVELOPMENT

Active Learning Summit 02/2023
Office of Instruction, University of Georgia

Peer Instruction Feedback Training 12/2022
FACS College, University of Georgia

MentorUp - Graduate Faculty Mentor Training [Completion Certificate] 08/2021
Graduate School, University of Missouri

Introduction to Python for Data Analysis [Completion Certificate] 05/2021
Statistical Horizons

UM System Teaching Scholars Program 08/2020–05/2021
University of Missouri System

Introduction to Social Network Analysis [Completion Certificate] 03/2021
Statistical Horizons

Center for Health Longevity Ideas Lab 03/2021
MU Center for Health Longevity, University of Missouri System

Excellence in Online Teaching [Completion Certificate] 06–08/2020
Online Teaching Certificate Seminar
Office of eLearning, University of Missouri System

Keep Learning Workshop Series 06–08/2020
Online and Remote Teaching Training, University of Missouri System

Inclusive Teaching Online Workshop 03/2020
Teaching for Learning Center, University of Missouri

Fundamentals of Being a Principal Investigator Workshop 01/2020
Office of Research and Economic Development, University of Missouri

Annual Teaching Renewal Week Conference 01/2020
Teaching for Learning Center, University of Missouri

Online Teaching Foundations [Completion Certificate] 08–12/2019
Course Design & Technology, University of Missouri

Research Development Series Workshop 08–12/2019
Office of Research Advancement & The Connector, University of Missouri

Teaching Academy 09/2019
Teaching for Learning Center, University of Missouri

Broader Impacts Writing Workshop 03/2019
The Connector, University of Missouri

Intensive Open Educational Resources (OER) Training 10/2018

The University of Missouri System

Faculty Grant Writing Institute 07/2018
College of Human Environmental Sciences, University of Missouri

Introduction to the Health and Retirement Study (HRS) Workshop 06/2018
Summer Institute in Survey Research Techniques, University of Michigan

Managing Big Data with MySQL [Completion Certificate] 06/2016
Coursera

R Programming [Completion Certificate] 10/2015
Coursera

Graduate Teaching Seminar 08–12/2013
Graduate School, University of Georgia

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