Blain Pearson, Ph.D., CFP®, AFC®

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| Department of Finance and EconomicsCollege of Business AdministrationCoastal Carolina University119 Chanticleer Dr WConway, SC 29528 | Email: Bpearson@coastal.eduOffice: Wall College of Business 101GOffice Phone: (843) 349-4053[LinkedIn](https://www.linkedin.com/in/blain-pearson-ph-d-cfp%C2%AE-afc%C2%AE-63233254/?trk=public_profile_browsemap); [Google Scholar](https://scholar.google.com/citations?user=mqDfsqYAAAAJ&hl=en) |

# Education

**Ph.D.** Texas Tech University 2020

Personal Financial Planning

 Lubbock, TX

 Dissertation Chair: Charlene Kalenkoski

**MBA** Campbell University 2013

 Management

 Buies Creek, NC

**BBA** Campbell University 2012

 Trust and Wealth Management

 Financial Planning Minor

 Buies Creek, NC

# Academic Appointments

**Coastal Carolina University**, Conway, SC 2022 to Present

Assistant Professor of Finance

Department of Finance and Economics

**Kansas State University**, Manhattan, KS 2020 to 2022

Professor of Practice | Undergraduate Program Director

Department of Personal Financial Planning

**Texas Tech University**, Lubbock, TX 2017 to 2020

Instructor

School of Financial Planning

# Professional Experience

**Hilltop Wealth Advisors**, Chapel Hill, NC 2013 to 2017

Financial Advisor

# Publications (total = 26) (abdc = 14)

## Peer-Reviewed Publications

**Pearson, B.**, Korankye, T., & Qing, D. The retirement consumption puzzle: A mental accounting explanation. *Journal of Financial Counseling and Planning. In-Press.*

(ABDC: C)

Liu, Y., Korankye, T., & **Pearson, B.** Personality traits and student loan holding for self and for children among baby boomers. *Journal of Financial Counseling and Planning. In-Press.*

(ABDC: C)

**Pearson, B.**, Korankye, T., & Liu, Y. Retirement planning, retirement insecurity, and financial satisfaction. *Journal of Retirement*. *In-Press.*

(ABDC: B)

**Pearson, B.**, & Korankye, T. The association between financial literacy confidence and financial satisfaction. *Review of Behavioral Finance*. *In-Press.*

https://doi.org/10.1108/RBF-03-2022-0090

(ABDC: B)

**Pearson, B.**, Quadria, T., & Asebedo, S. (2023). Personality traits, home value, and mortgage debt. *Journal of Financial Counseling and Planning, 34*(1), 127-136. https://doi.org/10.1891/JFCP-2021-0006

(ABDC: C)

Korankye, T., **Pearson, B.**, & Salehi, H. (2023). Financial advice use and saving for children’s college education: A propensity score matching approach. *Journal of Financial Counseling and Planning, 34*(1), 96-111. https://doi.org/10.1891/JFCP-2021-0069

(ABDC: C)

Rowena, G., Varani, L., **Pearson, B.,** & McCoy, M. (2023). ‘I’m just bad with money’: How self-fulfilling prophecy shapes financial behaviors. *Journal of Financial Planning, 36*(4), 62-70.

**Pearson, B.**, Korankye, T., & Qing, D. (2023). The role of financial advisors in shaping investment beliefs. *Journal of Personal Finance.* *22*(1), 24-36.

Korankye, T., **Pearson, B.**, & Salehi, H. (2023). The nexus between investor sophistication and annuity insurance ownership: Evidence from FINRA’s National Financial Capability Study. *Managerial Finance.* *49*(2), 398-419*.* https://doi.org/[10.1108/MF-04-2022-0169](https://doi.org/10.1108/MF-04-2022-0169)

(ABDC: B)

Korankye, T., & **Pearson, B.** (2023). How engaging in financial management activity relates to the experiential well-being of Americans. *Journal of Risk and Financial Management, 16*(2), 132. https://doi.org/10.3390/jrfm16020132

(ABDC: B)

Hanson, S., & **Pearson, B**. (2023). Availability bias: Retrievability, narrow range of experience, and client behavior. *Journal of Financial Planning,* *36*(1), 49-53.

**Pearson, B.**, Korankye, T., & Salehi, H. (2023). Comparative advantage in the household: Should one person specialize in a household’s financial matters?. *Journal of Family and Economic Issues*, *44*(1), 114-124. https://doi.org/10.1007/s10834-021-09807-y

(ABDC: B)

**Pearson, B.**, & Lacombe, D. (2022). Retirees, financial planning horizon, and retirement satisfaction. *Financial Planning Research Journal*, *8*(1), 26-39.

(ABDC: C)

**Pearson, B.**, Qing, D., & Korankye, T. (2022). The role of financial relativity in loss aversion sensitivity. *Empirical Economics Letters,* *21*(8), 55-63.

(ABDC: C)

Glasgow, R., Meyers, S., Walsh., C., & **Pearson, B.** (2022). Investment diversification and client resistance: A behavioral understanding. *Journal of Financial Planning,* *35*(10), 48-53.

**Pearson, B.** (2022). The role of personal financial salience: Part II. *Journal of Financial Planning, 35*(9), 60-69.

**Pearson, B.**, & Lee, J. (2022). Student debt and healthcare service usage. *Journal of Financial Counseling and Planning*, *33*(2), 183-193.https://doi.org/10.1891/JFCP-2021-0030(ABDC: C)

Cilley, N., & **Pearson, B.** (2022). Confirmation bias and financial planning: Narratives from industry. *Journal of Financial Planning,* *35*(4), 58-61.

**Pearson, B.**, & Kalenkoski, CM. (2022). The association between retiree migration and retirement satisfaction. *Journal of Financial Counseling and Planning, 33*(1),56-65.

https://doi.org/10.1891/JFCP-20-00064

(ABDC: C)

Buland, L., & **Pearson, B.** (2022). Framing: Presenting clients a clearer look into their financial window. *Journal of Financial Planning,* *35*(1), 44-49.

Sterbenz, E., Ross, D., Smith, J., McCoy, M., & **Pearson, B.** (2021). Using scaffolding learning theory as a framework to enhance financial education with financial planning clients. *Journal of Financial Planning, 34*(12), 70-80.

**Pearson, B.** (2021). The role of personal financial salience. *Journal of Financial Planning,* *34*(8), 74-86.

**Pearson, B.**, & Lacombe, D. (2021). The relationship between home equity and retirement satisfaction. *Journal of Personal Finance*, *20*(1), 40-51.

**Pearson, B.**, & Guillemette, M. (2020). The association between financial risk and retirement satisfaction.*Financial Services Review*, *28*(4), 341-350.

(ABDC: B)

**Pearson, B.** (2020). Demographic variations in the perception of the investment services offered by financial advisors. *Journal of Accounting and Finance, 20*(3), 127-139. https://doi.org/10.33423/jaf.v20i3.3014

**Pearson, B.** (2020). Ethics of disclosure in financial planning: Should the financial planning industry be intentional in disclosing practice violations?. *Journal of the Texas Tech University Ethics Center*, *4*(2), 77-88.

## Book Chapters

**Pearson, B.** (2023). Consumer estate planning behavior. In Xiao, J. J., & Kumar, S. (eds.), A research agenda for consumer financial behavior, *Edward Elgar Publishing*, 171-185.

## Conference Proceedings and Reports

## Curnutt, G., & Pearson, B. (2023). Short-term financing usage: A comparison of the Carolinas to the U.S. Proceedings of the Appalachian Research in Business Symposium – 10th Annual Conference. 50-61

## Pearson, B. (2021). the role of financial advisors in shaping investment beliefs. Consumer Interests Annual - Volume 67.

## Pearson, B. (2020). A case for utilizing home equity in retirement. 2020 AFCPE Symposium Proceedings. 107-113.

## Woerheide, W. (2020). The role of personal financial salience. From Theory to Practice: Overviews and Practical Implications of Research Presented at the FPA Annual Conference 2020. Journal of Financial Planning. 52-58.

## Pearson, B. (2020). Comparative advantage in the household: Should one person specialize in a household’s financial matters? Academy of Financial Services 2020 Conference Proceedings.

## Pearson, B., Quadria, T., & Asebedo, S. (2020). The association between personality traits and consumer residential preferences. Consumer Interests Annual - Volume 66.

# Refereed Presentations

**Pearson, B**., Korankye, T., Qi, D. (2023). Subjective Health Status and Annuity Participation. 2023 ACCI Annual Conference. Las Vegas, NV.

Korankye, T., **Pearson, B**., Manzo, M. (2023). Financial Education and College Savings. 2023 ACCI Annual Conference. Las Vegas, NV.

Ying, C., Qi, D., Ning, W., & **Pearson, B**. (2023). Racial Disparities in Cryptocurrency: Diversity or Bias. 2023 ACCI Annual Conference. Las Vegas, NV.

Curnutt, G., & **Pearson, B.** (2023). Predatory Financing Usage: A Comparison of the Carolinas to the U.S. Appalachian Research in Business Symposium. Radford, Virginia.

Korankye, T., & **Pearson, B.** (2022). Managing Household Finances: How Engaging in Financial Management Activity Relates to the Experiential Well-Being of Americans. CFP® Board Academic Research Colloquium for Financial Planning and Related Disciplines. Arlington, VA.

**Pearson, B.**, &Korankye, T. (2022). Retirement Planning, Retirement Insecurity, and Financial Satisfaction. Orlando, FL. 2022 AFCPE® Research Symposium. *Invited.*

Korankye, T., & **Pearson, B.** (2022). Managing Household Finances: How Engaging in Financial Management Activity Relates to the Experiential Well-Being of Americans. Orlando, FL. 2022 AFCPE® Research Symposium. *Invited.*

Korankye, T., & **Pearson, B.** (2022). Managing Household Finances: How Engaging in Financial Management Activity Relates to the Experiential Well-Being of Americans. National Bureau of Economic Research - Summer Institute 2022. Virtual.

Bennetts, C., Anderson, J., & **Pearson, B.** (2022). Mental Accounting, Estate Bequests, and Retirement Satisfaction. 2022 ACCI Annual Conference. Clear Water, FL.

Korankye, T., & **Pearson, B.** (2022). Mortgage Debt, Home-Equity Loan, and Financial Satisfaction in Retirement: Are There Differences Among Racial and Ethnic Groups in the United States? 2022 ACCI Annual Conference. Clear Water, FL.

Korankye, T., **Pearson, B.**, & Salehi, H. (2022). Back to Basics: Understanding Millennials' Retirement Plan Participation Decisions from the Perspectives of Employer Contribution and Automatic Enrollment. 2022 ACCI Annual Conference. Clear Water, FL.

**Pearson, B.**, Korankye, T., & Qing, D. (2022). The Role of Financial Relativity in Loss Aversion. 2022 ACCI Annual Conference. Clear Water, FL. *Invited*.

Korankye, T., **Pearson, B.**, & Salehi, H. (2022). The Nexus Between Ownership of Annuity Insurance and Investor Sophistication: Evidence from the U.S. National Financial Capability Study. 61st Annual Southwestern Finance Association (SWFA) Conference. New Orleans, LA.

Korankye, T., & **Pearson, B.** (2022). Managing Household Finances: How Engaging in Financial Management Activity Relates to the Experiential Well-Being of Americans. 3rd Annual Personal Finance Symposium. Virtual.

**Pearson, B.**, Korankye, T., & Salehi, H. (2021). The Role of Financial Advisors in Shaping Investment Beliefs. 2021 AFCPE® Research Symposium. Virtual.

Korankye, T., & **Pearson, B.** (2021). Mortgage Debt, Home-Equity Loans, and Financial Satisfaction in Retirement: Are there Differences among Racial and Ethnic Groups in the United States? 2021 AFCPE® Research Symposium. Virtual.

Korankye, T., **Pearson, B.**, & Salehi, H. (2021). The Role of Financial Advice in Promoting College Savings Among Households. 2021 AFCPE® Research Symposium. Virtual.

**Pearson, B.** (2021). The Association between Financial Advisors and Crisis-Driven Equity Beliefs. 2021 ACCI Annual Conference. Virtual – Originally Scheduled in Arlington, VA.

**Pearson, B.**, Seay, M., McCoy, M., Huston, S., Wilson, J., & Sanders, K. (2020). Shift Happens - Best Practices for Transitioning Financial Planning Instructional Modalities During Times of Crisis: A Panel Discussion from Faculty Who Did It. 2020 CFP® Registered Program Conference. Virtual – Originally Scheduled in Arlington, VA.

**Pearson, B.** (2020). A Case for Utilizing Home Equity in Retirement. 2020 AFCPE® Research Symposium. Virtual – Originally Scheduled in New Orleans, LA.

**Pearson, B.** (2020). Student Loans and the Demand for Healthcare. Journal of Financial Counseling and Planning’s Trends in Consumer Finance sponsored by the FINRA Investor Education Foundation. Virtual – Originally Scheduled in New Orleans, LA.

**Pearson, B.** (2020). Comparative Advantage in the Household: Should One Person Specialize in a Household’s Financial Matters? Academy of Financial Services Annual Meeting 2020. Virtual – Originally Scheduled in Phoenix, AZ.

**Pearson, B.** (2020). Are Financial Apps and Websites Effective in Helping Individuals with their Financial Goals? – Implications for Financial Planners. 2020 FPA Annual Conference. Virtual – Originally Scheduled in Phoenix, AZ.

**Pearson, B.**, Quadria, T., & Asebedo, S. D. (2020). The Association between Personality Traits and Residential Preferences. 2020 ACCI Annual Conference. Virtual – Originally Scheduled in Arlington, VA.

**Pearson B.** (2020). Ethics of Disclosure in Financial Planning: Should the Financial Planning Industry be Intentional in Disclosing Practice Violations? 4th Annual Texas Tech University Ethics Symposium. Lubbock, TX.

**Pearson B.**, and Guillemette, M. (2020). The Association between Decreasing Relative Risk Aversion and Retirement Satisfaction. 2020 ARC for Financial Planning and Related Disciplines Doctoral Seminar. Arlington, VA.

**Pearson B.** (2019). The Association between Retiree Migration and Retirement Satisfaction. 2019 ARC for Financial Planning and Related Disciplines. Arlington, VA.

# Refereed Poster Presentations

**Pearson, B.**, & Kalenkoski, CM. (2020). U.S. Census Divisional Variation in Diabetes, Lung Disease, Cancer, and Arthritis among Retirees. 19th Annual Graduate Student Research Poster Competition. Lubbock, TX.

**Pearson, B.** (2020). Demographic Variations in the Perception of the Investment Services Offered by Financial Advisors. 2020 ARC for Financial Planning and Related Disciplines. Arlington, VA.

**Pearson, B.**, & Kalenkoski, CM. (2019). The Association between Retiree Migration and Retirement Satisfaction. Graduate Student Poster Competition. Lubbock, TX.

# Other Presentations

**Pearson, B.** (2024). Asset Decumulation During an Era of Defined Benefit Plans: A Case of Intertemporal Miscalibration. Business Faculty Research Alliance. University of North Alabama. Florence, AL

Bennetts, C., Anderson, J., & **Pearson, B.** (2023). Mental Accounting, Estate Bequests, and Retirement Satisfaction. PFP Advisors Summit. Kansas City, KS.

Korankye, T., & **Pearson, B.** (2023). Managing Household Finances: How Engaging in Financial Management Activity Relates to the Experiential Well-Being of Americans. Lubbock, TX. 2023 Texas Tech Financial Planning Research Series.

**Pearson, B.** (2022). Why Emotional Spending is a Pitfall to Financial Success. Rho Pi chapter of Alpha Kappa Alpha Sorority®. Coastal Carolina University. Conway, SC.

**Pearson, B.** (2022). The Role of Financial Relativity in Loss Aversion. Kansas State University’s Readings in Personal Financial Planning. Manhattan, KS.

**Pearson, B.** (2022). Financial Planning for Retirement Satisfaction. Texas Tech University’s Center for Financial Responsibility - Financial Planning Research Series. Lubbock, TX.

**Pearson, B.** (2022). Financial Planning in the Early Stages of Retirement. The National Association of Personal Financial Advisors 2022 Symposium. Denver, CO.

**Pearson, B.**, Cramer, J., & Williams, C. (2021). Balanced Momentum Investing. Georgetown University’s Finance Clinic. Washington, D.C.

**Pearson, B.** (2021). Retirement Satisfaction: A Literature Review of What We Know. Kansas State University’s Readings in Personal Financial Planning. Manhattan, KS.

**Pearson, B.** (2020). Migration in Retirement and the Relationship with Retiree Well-Being. Kansas State University’s Personal Financial Planning Doctoral Research Seminar. Manhattan, KS.

**Pearson, B.**, & Kalenkoski, CM. (2019). The Association between Retiree Migration and Retirement Satisfaction. 5th Annual Texas Tech University’s Three Minute Thesis Competition. Lubbock, TX.

**Pearson, B.**, & Kalenkoski, CM. (2019). The Association between Location, Financial Circumstances, and Social Networks and Retirement Migration Decisions. Texas Tech University’s Financial Planning Research Series. Lubbock, TX.

**Pearson, B.**, & Kalenkoski, CM. (2019). The Association between Retiree Migration and Retirement Satisfaction. Texas Tech University’s Graduate Student Poster Competition. Lubbock, TX.

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# Media Presence

## Media Publications

Harper, R. (2022). Putting Home Equity to Work During Retirement with Dr. Blain Pearson. Elementality for Financial Advisors. South Jordan, UT.

Yerger, D. (2021). A Smart Financial Plan – Ep. 4 – Dr. Blain Pearson. MY Wealth Planners™. Longmont, CO.

**Pearson, B.** (2019). Simplify your financial life. Lubbock Avalanche-Journal. Lubbock, TX.

**Pearson, B.** (2019). 8 Financial Factors to Consider when Moving. Lubbock Avalanche-Journal. Lubbock, TX.

## Media Citations

Kellner, G. (2023). Are there psychological biases that can lead to people making poor choices when buying car insurance? MoneyGeek. San Francisco, CA.

Bhaimiya, S. (2023). 'Cash-stuffing' is a Gen Z trend taking TikTok by storm. Here's why the tech-obsessed generation is bringing this budgeting hack back. Yahoo! Finance. New York, NY.

Paulus, N. (2023). What Is Behavioral Finance? MoneyGeek. San Francisco, CA.

Papas, J. (2022). Best Guaranteed Approval Credit Cards. WalletHub. Washington, D.C.

Harper, R. (2022). Why Financial Salience Matters. Elementality for Financial Advisors. South Jordan, UT

Cowles, C. (2022). I’m Getting Married and Having a Baby. How Should I Plan? The Cut. New York, NY.

Sleight, M. (2022). Expert Advice: Finding the Best Life Insurance. Moneygeek. San Francisco, CA.

Kiernan, J. (2022). Best Balance Transfer Credit Cards. WalletHub. Washington, D.C.

Shkurtaj, T. (2022). What is the TikTok cash-stuffing trend? The U.S. Sun. Boca Raton, FL.

Payne, K. (2022). Best Cash Advance Credit Cards for 2022. Moneygeek. San Francisco, CA.

Johnson, H. (2022). Best Credit Cards for People with Excellent Credit in 2022. MoneyGeek. San Francisco, CA.

Aquino, L. (2021). 6 basic facts people are always surprised to learn about money, according to the experts who teach them. Business Insider. New York, NY.

Aquino, L. (2021). I went down a 'cash-stuffing' rabbit hole on TikTok that's making an old-school budgeting hack trendy again. Business Insider. New York, NY.

Aquino, L. (2021). 5 everyday money mistakes that are worse than you might think. Business Insider. New York, NY.

Papas, J. (2021). Compare Credit Cards FAQ. WalletHub. Washington, D.C.

Brereton, E. (2021). Is Your Post-Pandemic Cash Flow Strong? OppFi. Chicago, IL.

Kiernan, J. (2021). Ask The Experts: Best Credit Cards to Build Credit. WalletHub. Washington, D.C.

Tepper, T. and Curry, B. (2021). Should You Be Worried About Inflation? Forbes ADVISOR. Jersey City, NJ.

Self-Walbrick, S. (2019). Data shows cost, convenience factors in keeping young adults on family phone plan. Lubbock Avalanche-Journal. Lubbock, TX.

# Grants

Kansas State University 2021

Center for the Advancement of Digital Scholarship

Open/Alternative Textbook Initiative

Primary Investigator: **Blain Pearson**

Amount Funded: $5,000

# Teaching Experience

Undergraduate Teaching Appointments (CCU) 2022 – Present

Coastal Carolina University, Conway, SC

Department of Finance and Economics

* FIN 310 – Business Finance
	+ Fall 2022 (2 Sections)
* FIN 402 – Investment Analysis
	+ Fall 2023
	+ Summer 2023
	+ Spring 2023 (2 Sections)
* FIN 404 – Business and Financial Statement Analysis
	+ Fall 2023 (2 Sections)
	+ Summer 2023
	+ Spring 2023
	+ Fall 2022

Adjunct Graduate Teaching Appointments (KSU) 2022

Kansas State University, Manhattan, KS

Department of Personal Financial Planning

* PFP 770 – Applied Behavioral Finance
	+ Summer 2022

Graduate Teaching Appointments (KSU) 2021

Kansas State University, Manhattan, KS

Department of Personal Financial Planning

* PFP 894 – Financial Planning Policy and Research
	+ Summer 2021
* PFP 756 – Financial Counseling
	+ Fall 2021
* PFP 770 – Applied Behavioral Finance
	+ Summer 2021
* PFP 624 – Fundamentals of Family Financial Planning
	+ Fall 2021

Undergraduate Teaching Appointments (KSU) 2020 – 2022

Kansas State University, Manhattan, KS

Department of Personal Financial Planning

* PFP 105 – Introduction to Personal Financial Planning
	+ Spring 2022
	+ Fall 2021 (2 Sections)
	+ Spring 2021
	+ Fall 2020 (2 Sections)
* PFP 320 – Applied Behavioral Finance
	+ Spring 2022 (2 Sections)
	+ Spring 2021 (2 Sections)
* PFP 456 – Financial Counseling and Communication
	+ Fall 2021 (2 Sections)
	+ Fall 2020 (2 Sections)
* PFP 595 – Capstone in Personal Financial Planning
	+ Spring 2022 (2 Sections)
	+ Spring 2021 (2 Sections)

Graduate Teaching Appointments (TTU) 2018 – 2020

Texas Tech University, Lubbock, TX

Department of Personal Financial Planning

* PFP 5311 – Personal Financial Planning Capstone (Ph.D. Level)
	+ Spring 2020
	+ Fall 2019
* PFP 5373 – Personal Financial Planning Capstone (Masters Level)
	+ Spring 2020
	+ Fall 2019
* PFP 5371 – Fundamentals of Personal Financial Planning
	+ Summer 2018

Undergraduate Teaching Appointments (TTU) 2018 – 2020

Texas Tech University, Lubbock, TX

Department of Personal Financial Planning

* PFP 4370 – Personal Financial Planning Capstone
	+ Spring 2020
	+ Fall 2019
* PFP 2315 – Fundamentals of Personal Financial Planning
	+ Summer 2018
* PFP 3376 – Fundamentals of Asset Management
	+ Summer 2019
	+ Fall 2018
	+ Spring 2018

Graduate Teaching Assistant Appointments (TTU) 2017 – 2019

Texas Tech University, Lubbock, TX

Department of Personal Financial Planning

* PFP 5373 – Capstone in Personal Financial Planning (Graduate)
	+ Spring 2019^
* PFP 5371 – Fundamentals of Personal Financial Planning (Graduate)
	+ Spring 2018
	+ Spring 2018^
	+ Fall 2017
* PFP 5362 – Fundamentals of Asset Management
	+ Spring 2019
	+ Spring 2019^

^Denotes hybrid professional courses taught through Texas Tech University at Fidelity Investments in Westlake, Texas.

Undergraduate Teaching Assistant Appointments (TTU) 2017 – 2019

Texas Tech University, Lubbock, TX

Department of Personal Financial Planning

* PFP 2315 – Fundamentals of Personal Financial Planning
	+ Spring 2018
	+ Fall 2017
* PFP 3376 – Fundamentals of Asset Management
	+ Spring 2019

# Academic and Professional Service

Association for Financial Counseling and Planning Education® 2023 – 2024

AFC® Certification Council, Nominating Committee Chair

Association for Financial Counseling and Planning Education® 2022 – 2025

AFC® Certification Council, Voting Member

American Council on Consumer Interests 2022 – 2025

Investment Committee (Treasury Subcommittee)

Managerial Finance 2022 – Present

*Managerial Finance*, Peer Reviewer

International Journal of Consumer Studies 2021 – Present

*International Journal of Consumer Studies*, Peer Reviewer

Financial Planning Association 2021 – Present

*Journal of Financial Planning*, Editorial Board

International Association of Registered Financial Consultants 2021 – Present

*Journal of Personal Finance*, Editorial Board

Association for Financial Counseling and Planning Education® 2021 – Present

*Journal of Financial Counseling and Planning*, Peer Reviewer

American Association of Family and Consumer Sciences 2021 – Present

*Family and Consumer Sciences Research Journal*, Peer Reviewer

American Council on Consumer Interests 2021 – Present

ACCI Conference, Peer Reviewer

American Council on Consumer Interests 2021 – Present

Student/Young Professional Conference Scholarships Awards Committee

Association for Financial Counseling and Planning Education® 2020 – Present

AFCPE® Conference, Peer Reviewer

Academy of Financial Services 2020 – Present

Academy of Financial Services Conference, Peer Reviewer

Kansas Core Outcomes Group (KCOG) 2020 – 2022

Transfer and Articulation Council for Personal Finance, Chair

# University and Departmental Service

Coastal Carolina University, Conway, SC 2023 – Present

Department of Finance and Economics, Student Advisor

Coastal Carolina University, Conway, SC 2023 – Present

Wall College of Business, Vice-Chair of Strategic Planning Committee

Coastal Carolina University, Conway, SC 2022 – Present

Department of Finance and Economics, CFP® Program Director

Coastal Carolina University, Conway, SC 2022 – Present

Annual Undergraduate Research Competition, Judge

Kansas State University, Manhattan, KS 2021 – 2022

Department of Personal Financial Planning, Undergraduate Director

Kansas State University, Manhattan, KS 2021 – 2022

Peer Mentor Program, Faculty Coordinator

Kansas State University, Manhattan, KS 2021 – 2022

ConNEXTion Competition Team, Faculty Advisor

Kansas State University, Manhattan, KS 2021 – 2022

AFCPE® Competition Team, Faculty Advisor

Kansas State University, Manhattan, KS 2020 – 2022

AFCPE®, University Representative

Kansas State University, Manhattan, KS 2020 – 2022

Department of Personal Financial Planning, Undergraduate Committee

Kansas State University, Manhattan, KS 2020 – 2021

Department of Personal Financial Planning, Instructor Search Committee

Texas Tech Debate Team Advisor, Lubbock, TX 2019 – 2020 Housing and Wealth Inequality Advisor

Texas Tech Personal Financial Planning YouTube Page, Lubbock, TX 2018 – 2020

https://www.youtube.com/channel/UCjfe3F1n9MmlDscW7J46U8Q

Mentor Tech, Lubbock, TX 2018 – 2020

Graduate Mentor

Texas Tech Groundwork, Lubbock, TX 2018

Graduate Coordinator

# Certifications and Licenses

Certified Financial Planner™ (#194124)

Accredited Financial Counselor® (#42675757)

Chartered Financial Analyst Level II Candidate

SIE – Securities Industry Essentials

Series 7 - General Securities Representative (Expired)

Series 66 - Uniform Combined State Law Examination (Expired)

NC Life Insurance License

NC Variable Annuity License

NC Accident, Health & Sickness Insurance License

NC Long Term Care Insurance License

e-Money Fundamentals Certification

# Awards

James P. and Elizabeth R. Blanton Distinguished Research Award 2023

JFCP Outstanding Reviewer 2023

FTA Outstanding Research Award 2022

FINRA NFCS Research Award 2021

AFCPE® Outstanding Symposium Research Award 2021

4th Annual Texas Tech University Ethics Paper Competition, Second Place 2020

Helen DeVitt Jones Excellence in Graduate Teaching Award 2020

Pi Beta Phi Faculty Award 2019

# Fellowships

Helen Devitt Fellowship 2017-2020

Department of Personal Financial Planning

Texas Tech University

# Professional Affiliations

Academy of Financial Services

American Council on Consumer Interests

Association for Financial Counseling & Planning Education

Beta Gamma Sigma International Business Honor Society

Certified Financial Planning Board of Standards

Chartered Financial Analyst Institute

Financial Planning Association