Derek R. Lawson, Ph.D., CFP®

Assistant Professor	8698 Kinzie Jo's Way
Department of Personal Financial Planning	Manhattan, KS 66502
College of Health & Human Sciences	(515) 707-3729
Kansas State University	drlawson@ksu.edu

EDUCATION

Ph.D.	2019	Personal Financial Planning Kansas State University, Manhattan, KS
M.S.	2014	Family Studies and Human Services Emphasis in Personal Financial Planning Kansas State University, Manhattan, KS
B.B.A.	2011	Finance University of Iowa, Iowa City, IA

PROFESSIONAL DESIGNATIONS

CERTIFIED FINANCIAL PLANNER™ (CFP®)

EXPERIENCE

Kansas State University

Professor of Practice, Personal Financial Planning (PFP)	2024-Present
Undergraduate Program Director, PFP	2022-Present
Assistant Professor, PFP	2019-2024

Priority Financial Partners

Partner, CCO, & CIO	2021-Present
Partner & CERTIFIED FINANCIAL PLANNER™	2017-2020
Hourly Planner	2015-2016

Kitces.com

Research Study Blog Writer	2024-Present
Research Associate	2014-2017

Texas Tech University

Visiting Instructor, Personal Financial Planning	2018-2019

Kansas State University

Graduate Research Assistant, Personal Financial Planning	2015-2018
Instructor, Personal Financial Planning	Fall 2017
Graduate Teaching Assistant, Family Studies & Human Services	Summer 2016

Sonas Financial Group, Inc.

Financial Planner	2012-2015

PEER-REVIEWED JOURNAL ARTICLES (Published & Accepted)

Lynn, C., Heckman, S., J., **Lawson, D. R.**, Kothakota, M. (Accepted). The effect of overspending on retirement preparation. *Financial Services Review*.

Joseph, M.*, Lim, H., **Lawson, D. R.**, MacDonald, M., & Chua, A. (2024). Do Ostriches Worry Less? Information Avoidance and Retirement Worry. *Journal of Financial Therapy, 15*(2).

Lynn, C.*, **Lawson, D. R.** [1]**,** & Pearson. B. (2024). How does credit revolving impact wealth and well-being? *Journal of Personal Finance 23*(1).

Anderson, J.*, & **Lawson D. R.** [1] (2023). A study of achievement, risk, and cryptocurrency using learned needs theory. *Journal of Financial Planning, 36*(8), 74-83.

Anderson, S. G., Heckman, S. J., & **Lawson, D. R.** (2022). The influence of financial literacy on financial behaviors: Evidence from mandatory federal student loan counseling. *Journal of Family and Consumer Sciences, 114*(3), 20-33.

McCoy, M., Machiz, I.*, Harris, J. *, Lynn, C. *, **Lawson D. R.,** & Rollins-Koons, A*. (2022). The science of building trust and commitment in financial planning: Using structural equation modeling to examine antecedents to trust and commitment. *Journal of Financial Planning, 35*(12).

Archuleta, K. L., Glenn, C., **Lawson, D. R.,** Clady, J., & Solomon, S. (2021). I know I should, but do I do it? Connecting covert and overt financial behaviors. *Journal of Financial Counseling and Planning, 32*(3), 550-563.

Enete, S., Heckman, S. J., & **Lawson, D. R.** (2021). Financial attitudes and charitable giving. *Journal of Financial Counseling and Planning, 32*(1), 104-115.

Russell, M.*, Strong, C. R.*, Krausman, J. * & **Lawson. D. R.**[1] (2021). Is retirement that easy? Analyzing the impact of financial rules of thumb through the Theory of Planned Behavior? *Journal of Personal Finance, 20*(2), 40-56.

Sturr, T.*, Lynn, C.*, & **Lawson, D. R.**[1] (2021). Financial self-efficacy and retirement preparation. *Journal of Financial Planning, 34*(6), 86–98.

Lawson, D. R., Scroggs, B. A. & Vennum, A. (2019). The influence of parental warmth on income and well-being during the transition to adulthood: A life-span approach comparing sexual minority and heterosexual individuals. *Journal of Financial Counseling and Planning, 30*(2), 202-212.

Anderson, S. G., Seay, M. C., Kim, K. T., & **Lawson, D. R.** (2019). Advisor compensation: Which clients know and how do they pay? *Financial Services Review, 27*(3), 231-255.

Britt-Lutter, S. L., Dorius, C., & **Lawson, D. R.** (2018). The financial implications of cohabitation. *Journal of Financial Planning, 31*(4), 38-45.

Britt, S. L., Hill, E. J., LeBaron, A., **Lawson, D. R.** [2], & Bean, R. (2017). Tightwads and spenders: Predicting financial conflict in couple relationships. *Journal of Financial Planning, 30*(5), 36-42.

Lawson, D. R., & Heckman, S. J. (2017). Individual estimates of life expectancy and consumption patterns. *Financial Services Review, 26*(1), 1-18.

* Denotes student contributor
[1] Paper was part of a student-led project via a course.
[2] Included in the *Journal of Financial Planning's*, "Best of 2017" edition.

Lawson, D. R.[2,3]**,** & Klontz, B. T. (2017). Integrating behavioral finance, financial psychology, and financial therapy theory and techniques into the financial planning process. *Journal of Financial Planning, 30*(7), 48-55.

Seay, M. C., Anderson, S. G., **Lawson, D. R.** [2], & Kim, K. T. (2017). Identifying variation in client characteristics between financial planning compensation models. *Journal of Financial Planning*, *30*(10), 40-51.

Taylor, C. D., Klontz, B. T., & **Lawson, D. R.** (2017). Money disorders and locus of control: Implications for assessment and intervention. *Journal of Financial Therapy*, *8*(1), 124-137. https://doi.org/10.4148/1944-9771.1121

Britt, S. L., **Lawson, D. R.**, & Haselwood, C. A. (2016). A descriptive analysis of physiological stress and readiness to change. *Journal of Financial Planning*, *29*(12), 45-51.

MANUSCRIPTS SUBMITTED FOR PUBLICATION (or as a revise and resubmit)

Rollins-Koons, A.* & **Lawson, D.R.**, McCoy, M., Wu, J., Anderson, J., & Ludwig, E. (Revise & Resubmit Submitted June 2024). Exploring the relationships between virtual client meetings, financial anxiety, and trust in financial planning. *Financial Planning Research Journal.*

Joseph, M.*, **Lawson, D. R.** [1]**,** & Montalto, C. P. (Revise & Resubmit Submitted May 2024). Financial behaviors, worry, and the student loan debt burden of emerging adults. *Family and Consumer Sciences Research Journal*.

Wu, J.*, Machiz, I.*, McCoy. M., Rollins-Koons, A.*. White, JR., K., & **Lawson, D. R.** (Revise & Resubmit Submitted April 2024). The financial anxiety barbell curve: How too much or too little financial anxiety impacts a client's trust and commitment in their planner. *Journal of Financial Planning*.

Antonoudi, E.*, & **Lawson, D. R.**[1] (Submitted November 2023). The impact of financial optimism on financial behaviors: An application of the theory of planned behavior. *Financial Planning Review.*

Rollins-Koons, A.* & **Lawson, D.R.**[1] **(**Submitted October 2023). Charitably inclined and financially well: A time-series analysis of religiosity, donating, and financial well-being using a family financial socialization approach. *Journal of Financial Planning & Counseling (Special Edition).*

PEER-REVIEWED BOOK CHAPTERS

Klontz, B. T., & **Lawson, D. R.** (2019). Helping financial counseling clients with dysfunctional financial behaviors and money related disorders. In D. B. Durband, R. H. Law, & A. Mazzolini (Eds.), *Financial counseling*. New York, NY: Springer.

Lawson, D. R., Asebedo, S. D., & Seay, M. C. (2015). Property and casualty insurance. In C. Chaffin (Ed.), *Financial planning competency handbook* (2nd ed., pp. 263-274). Hoboken, NJ: John Wiley & Sons.

[3] Article was recipient of the *Journal of Financial Planning's* 2017 Montgomery-Warschauer Award.

Lawson, D. R., Klontz, B. T., & Britt, S. L. (2015). Money scripts. In B. T. Klontz, S. L. Britt, & K. L. Archuleta (Eds.), *Financial therapy: Theory, research, and practice* (pp. 22-34). New York, NY: Springer.

REPORTS AND WHITE PAPERS

McCoy, M., Ludwig*, Rollins-Koons, A.*, Wu, J.*, Anderson, J.*, **Lawson, D. R.** (2023). *Exploring the use of financial planning technology in Canadian practice.* [White Paper]. Financial Planning of Canada Grant.

Anderson, C., Deanna, S.L., McCoy, M., **Lawson, D. R.** (2022). *Developing and Maintaining Client Trust and Commitment in a Rapidly Changing Environment*. [White Paper]. https://www.financialplanningassociation.org/learning/research/client-communication

Lawson, D. R., & Seay, M. C. (2016, April). *Analysis of the Kansas Department of Agriculture employee satisfaction survey.* Report to the Kansas Department of Agriculture.

PEER-REVIEWED CONFERENCE PAPERS, POSTERS & PRESENTATIONS

McCoy, M., Watkins, K., **Lawson, D.R.**, Rollins-Koons, A. (2024). *From classroom to career: Factors influences entry and retention of financial planners.* Paper presented at the CFP Board ARC Conference, Washington D.C., Sep. 29 – Oct. 1, 2024.

Rollins-Koons, A.* & **Lawson, D.R.**,[4] McCoy, M., Wu, J., Anderson, J., & Ludwig, E. (2023). *Exploring the relationships between virtual client meetings, financial anxiety, and trust in financial planning*. Paper presented at the CFP Board ARC Conference, Washington D.C., Dec. 7 – 8, 2023. *Won Best Paper in Financial Planning Practice Award.*

Wu, J., Machiz, I., McCoy, M., Rollins-Koons, A., White, Jr., K., & **Lawson, D. R.** (2023). *The financial anxiety barbell curve: How too much or too little financial anxiety impacts a client's trust in and commitment to their planner*. Paper presented at the Association for Financial Counselors and Planning Educators (AFCPE) Conference, New Orleans, LA. Nov. 29 – Dec. 1, 2023.

Archuleta, K. L., Asebedo, S. D., Durband, D. B., Fife, S. T., Ford, M. R., Gray, B. T**., Lawson, D. R.,** Lurtz, M. R., McCoy, M. A., Pickens, J. C., & Sheridan, J. (2020). *Facilitating virtual client meetings for money conversations: Skills, strategies, and outcomes.*(Equal authorship contribution in alphabetical order.) Paper presented at the 2020 Financial Planning Association (FPA) annual conference academic track (virtual).

Archuleta, K. L., **Lawson, D. R.**, Glenn, C., Clady, J., & Jeong, D.[5] (2019, November). *Can Money Habitudes make a difference?* Paper Presented at the Association for Financial Counselors and Planning Educators (AFCPE) Conference, Portland, OR.

Archuleta, K. L., Glenn, C., **Lawson, D. R.**, Clady, J., & Solomon, S. (2017, November). *I know I should, but do I do it?* Paper Presented at the Association for Financial Counselors and Planning Educators (AFCPE) Conference, San Diego, CA.

Archuleta, K. L., **Lawson, D. R.**, Kaus, J., Becker, A., & Koochel, E. (2017, November). *Can a solution focused financial therapy approach work in a student peer financial counselor center? A report of preliminary analyses.* Poster Presentation at the Association for Financial Counselors and Planning Educators (AFCPE) Conference, San Diego, CA.

[4] Won "Best Paper in Financial Planning Practice" award.
[5] Won "Outstanding Symposium Research to Practice" award.

Lurtz, M., Zepp, P., Magwegwe, F., **Lawson, D. R.**, & Archuleta K. L. (2017, November). *Solution focused brief therapy: A correlation with financial wellness.* Poster Presentation at the Financial Therapy Association (FTA) Conference, San Diego, CA.

Britt-Lutter, S. L., Dorius, C., & **Lawson, D. R[6].** (2017, October). The financial implications of cohabitation. Paper at the Financial Planning Association's National Conference, Nashville, TN.

Lawson, D. R., & Heckman, S. J. (2017, April). *Influences of subjective life expectancy and the effect on health insurance decisions after the Affordable Care Act of 2010*. Paper Presented at the American Council of Consumer Interests (ACCI) Conference, Albuquerque, NM.

Lawson, D. R., & Heckman, S. J. (2016, October). *Individual estimates of life expectancy and consumption patterns*. Paper Presented at the Academy of Financial Services Conference, Las Vegas, NV.

Archuleta, K. L., & **Lawson, D. R.** (2016, May). *A Solution-Focused Approach to Financial Therapy*. Presented at the Financial Therapy Association Conference, Asheville, NC.

OTHER INVITED PAPERS, POSTERS & PRESENTATIONS

Archuleta, K. L., Asebedo, S. D., Gray, B., **Lawson, D. R.,** McCoy, M. A., Pickens, J. C., & Sheridan, J. (2021). Facilitating Virtual Client Meetings for Money Conversations: A Multidisciplinary Perspective. Financial Therapy Association Educational Webinar (virtual).

Anderson, S. G., Heckman, S. J., & **Lawson, D. R.** (2017, August). *Student loan entrance counseling effectiveness.* Poster Co-Presentation with S. G. Anderson at the 2017 Kansas State University Institute of Personal Financial Planning Practitioner-Oriented Poster Forum, Manhattan, KS. – 1st Place Prize.

Archuleta, K. L., Glenn, C., **Lawson, D. R.**, Clady, J., & Solomon, S. (2017, August). *I know I should, but do I do it? Introducing the financial cognition scale.* Poster Co-Presentation with C. Glenn at the 2017 Kansas State University Institute of Personal Financial Planning Practitioner-Oriented Poster Forum, Manhattan, KS. – 2nd Place Prize.

Seay, M. C., Anderson, S. G., **Lawson, D. R.**, & Kim, K. T. (2017, August). *Variation in client characteristics between financial planning compensation models*. Poster Co-Presentation with S. G. Anderson at the 2017 Kansas State University Institute of Personal Financial Planning Practitioner-Oriented Poster Forum, Manhattan, KS. – 3rd Place Prize.

Lawson, D. R., & Heckman, S. J. (2016, August). *Individual estimates of life expectancy and consumption patterns*. Poster Presentation at the 2016 Kansas State University Institute of Personal Financial Planning Practitioner-Oriented Poster Forum, Manhattan, KS.

GRANT ACTIVITIES

CFP Board
Project: Financial Planning Labor Study Proposal
Period: May 2023 – December 2024
Amount: $47,917 (funded)

[6] Won "Best theoretical paper" award.

Co-Primary Investigators are Dr. Megan McCoy and Kimberly Watkins

Financial Planning of Canada
Project: Exploring Financial Planning Technology in Light of COVID-19
Period: September 2022 – September 2023
Amount: $25,000 (funded)
Co-Primary Investigators are Dr. Megan McCoy and Joanne de Jong

Financial Planning Association® (FPA®) and Allianz Life Insurance Company of North America (Allianz Life) Research Grant
Project: Developing and Maintaining Client Trust and Commitment in a Rapidly Changing Environment
Period: February 21, 2021 – August 31, 2021
Amount: $20,000 (funded)
Co-Primary Investigator (40%) w/ Dr. Megan McCoy (60%)

American Psychological Foundation (APF) COVID-19 Rapid Response Grant
Project: Exploring Financial Stress through Virtual Interactions
Period: June 2020 – May 2021
Amount: $20,000 (not funded)
Co-Primary Investigator w/ Dr. Megan McCoy

2017 TD Ameritrade Institutional NextGen Grant Program: Established Program Grant
Project: Enhancing the Personal Financial Planning Program
Period: August 2017 – May 2018
Amount: $50,000 (not funded)
Primary Investigator

OTHER PUBLICATIONS

Lawson, D. R. (2015, February 4). Money matters: Are behavioral biases impacting your personal finances? *The Kansas City Star.* Retrieved from http://www.kansascity.com/news/business/personal-finance/article9075311.html

Lawson, D. R. (2014). Book review: It's not you, it's the dishes: How to minimize conflict and maximize happiness in your relationship. *Journal of Financial Therapy*, *5*(1), 92-94. http://dx.doi.org/10.4148/1944-9771.1080

Lawson, D. R. (2014). NexGen gathering is a one-of-a-kind experience [Letter to the editor]. *Journal of Financial Planning, 27*(8), 8.

Lawson, D. R. (2014, July 16). Money matters: Five ways to protect your online assets. *The Kansas City Star.* Retrieved from http://www.kansascity.com/news/business/personal-finance/article740697.html#/tabPane=tabs-603c299d-1

INVITED PRESENTATIONS

Lawson, D. R. (2023, August). *Cohort leader panel discussion about career and advice for the future generation.* Invited 90-minute panel discussion FPA NexGen Gathering, Denver, CO.

Lawson, D. R., Carlson, M. B., & Coambs, E. (2022, January). *Exploring the financial advice field: A panel discussion.* Invited one-hour panel discussion webinar for eMoney, online.

Lawson, D. R. (2021, June). *Behavioral Biases: A multidisciplinary approach to mastering purposeful inquiry and effective client engagement within the financial planning process.* Invited one-hour presentation to Financial Planning Association of NorCal's annual conference, online.

Lawson, D. R. (2020, November). *Behavioral Biases: A multidisciplinary approach to mastering purposeful inquiry and effective client engagement within the financial planning process.* Invited two-hour presentation to the 2020 Money Quotient® biennial Retreat, online.

Lawson, D. R. (2020, April). *Behavioral Biases: A multidisciplinary approach to mastering purposeful inquiry and effective client engagement within the financial planning process.* Invited one-hour presentation to Kansas State University's Institute of Personal Financial Planning 2020 Personal Financial Professional's Summit, Manhattan, KS.

Lawson, D. R. (2020, January). *Behavioral Biases: A multidisciplinary approach to mastering purposeful inquiry and effective client engagement within the financial planning process.* Invited one-hour presentation to the Douglas County, KS Estate Planning Council, online.

Lawson, D. R. (2019, May). *A Research Agenda Overview: The Past, Present, and Future.* Invited presentation for the Texas Tech University's Personal Financial Planning Program Research Series, Lubbock, TX.

Lawson, D. R. (2018, November). *Behavioral Biases: A multidisciplinary approach to mastering purposeful inquiry and effective client engagement within the financial planning process.* Invited two-hour presentation to the 2018 Money Quotient® biennial Retreat, Portland, OR.

Lawson, D. R., & Klontz, B. T. (2018, October). *Integrating behavioral finance, financial psychology, and financial therapy theory and techniques into the financial planning process*. Invited presentation to the Financial Planning Association's (FPA) annual conference as the Montgomery- Warschauer award-winner paper, Chicago, IL.

Lawson, D. R., & Koochel, E. E. (2018, April). *Salary negotiation for graduate students*. Invited presentation to Kansas State Graduate School Council, Manhattan, KS.

Lawson, D. R., & Zimmerman, S. (2017, November). *Money and relationships: Working with complex systems in financial therapy.* Invited presentation to Financial Therapy Association's (FTA) annual conference, San Diego, CA.

Haselwood, C**. & Lawson, D. R.** (2017, June). *Budgeting, Credit, and Debt*. Invited presentation to Kansas State Graduate School Summer Undergraduate Research Opportunity Program (SUROP), Manhattan, KS.

Lawson, D. R. (2017, June). *Tightwads and spenders: Predicting financial conflict in couple relationships.* Invited presentation to Financial Planning Association (FPA) of Colorado's June 2017, chapter meeting, Denver, CO.

Lawson, D. R. (2017, May). *Graduate Student Council President's address to graduating students.* Invited short speech to Kansas State University Graduate School's May 2017 commencement ceremonies, Manhattan, KS.

Lawson, D. R. (2017, April). *What's Financial Therapy got to do with it*? Invited presentation to Kansas State University – IFACE 2017, Manhattan, KS.

Haselwood, C**. & Lawson, D. R.** (2017, April). *Salary negotiation*. Invited presentation to Kansas State Graduate School Council, Manhattan, KS.

Lawson, D. R. (2016, April). *Why Financial Therapy: What is it, and how to use it in practice*? Invited presentation to Kansas State University – Salina Personal Financial Planning Careers Class, Salina, KS.

Lawson, D. R. (2016, March). *Networking in the financial planning industry.* Invited presentation to Kansas State University Personal Financial Planning Careers Class, Manhattan, KS.

Haselwood, C**. & Lawson, D. R.** (2016, February). *Start smart: Salary negotiation*. Invited presentation to Kansas State Graduate School Council, Manhattan, KS.

Haselwood, C., & **Lawson, D. R.** (2016, February). *Marriage and money*. Invited presentation to Kansas State Graduate School Council, Manhattan, KS.

TEACHING EXPERIENCE

Assistant Professor, Kansas State University

PFP 105: Introduction to Personal Financial Planning
Summer 2021 – Online (N/A)

PFP 305: Advanced Personal Financial Planning
Fall 2021 – Campus (5.0/5.0)
Fall 2021 – Online (5.0/5.0)
Spring 2021 – Campus (4.8/5.0)
Spring 2021 – Online (5.0/5.0)
Fall 2020 (5.0/5.0)
Spring 2020 – Campus (4.6/5.0)[7]
Spring 2020 – Online (4.7/5.0)
Fall 2019 (4.9/5.0)

PFP 460: Retirement Planning Concepts
Fall 2022 – Campus (4.8/5.0)
Fall 2022 – Online (5.0/5.0)

PFP 472: Personal Income Tax Concepts
Fall 2023 – Online (5.0/5.0)
Fall 2022 – Campus (4.9/5.0)
Fall 2022 – Online (5.0/5.0)

[7] I took paternity leave after three weeks of class; upon my return, class was moved abruptly to online only due to COVID-19. One student appears to have took exception to that. Omitting that student's response, I have a 4.9/5.0.

PFP 482: Personal Investment Concepts II
Spring 2024 – Online (5.0/5.0)
Spring 2023 – Campus (4.9/5.0)
Spring 2023 – Online (5.0/5.0)
Spring 2022 – Campus (4.9/5.0)
Spring 2022 – Online (5.0/5.0)
Spring 2021 – Campus (4.9/5.0)
Spring 2021 – Online (5.0/5.0)

PFP 772: Personal Income Tax Concepts
Summer 2024 (4.9/5.0)
Summer 2023 (5.0/5.0)
Summer 2022 (4.6/5.0)

PFP 808: Research Cluster: Structural Equation Modeling (SEM)
Fall 2022 (5.0/5.0)
Fall 2021 (5.0/5.0)
Fall 2020 (5.0/5.0)

PFP 956: Clinical Research Methods & Experimental Design
Summer 2024 (4.9/5.0)
Summer 2023 (5.0/5.0)
Summer 2022 (4.8/5.0)
Summer 2021 (4.9/5.0)
Summer 2020 (4.8/5.0)
Summer 2019 (4.7/5.0)

PFP 579: Pre-Internship Orientation in Personal Financial Planning
Fall 2023 – Online (4.9/5.0)
Fall 2019 - Campus (4.8/5.0)
Fall 2019 - Online (5.0/5.0)

PFP 468: Practice Management
Spring 2024 – Campus (4.9/5.0) – co w/ Steve Levitt
Spring 2024 – Online (4.9/5.0) – co w/ Steve Levitt
Spring 2023 – Campus (4.7/5.0) – co w/ Dr. Martin Seay
Spring 2023 – Online (4.7/5.0) – co w/ Dr. Martin Seay

Instructor, Texas Tech University

PFP 3374: Retirement Planning
Spring 2019 (4.9/5.0)
Fall 2018 (4.9/5.0)

PFP 3386: Wealth Management
Spring 2019 (4.9/5.0)
Fall 2018 (5.0/5.0)

PFP 5372: Graduate Wealth Management
Spring 2019 (4.8/5.0)
Fall 2018 (4.8/5.0)

Instructor, Kansas State University
PFP 472: Personal Income Tax
Fall 2017 (5.0/5.0)

Co-Instructor, Kansas State University
PFP 595: Professional Seminar in PFP (CFP® Board Capstone Course)
Spring 2018

Teaching Assistant, Kansas State University
PFP 909: SAS Coding
Spring 2017

PFP 769: Money and Relationships
Spring 2017, Spring 2016

FSHS 801: Grant Development & Management
Summer 2016

PFP 756: Financial Counseling
Fall 2015

PFP 771: Financial Therapy Theory & Research
Fall 2015

Tutor, Kansas State University
FINAN 450: Principles of Finance
Spring 2018, Fall 2017, Spring 2017, Fall 2016, Spring 2016

GRADUATE STUDENT ADVISING

Major or Co-Major Professor:

Nathan Collier	Ph.D., Personal Financial Planning	Expected 2025
Brandon Ratzlaff	Ph.D., Personal Financial Planning	Expected 2025
Chet Bennetts (Co-Chair)	Ph.D., Personal Financial Planning	2024
Ashlyn Rollins-Koons	Ph.D., Personal Financial Planning	2024
Lena Gan (Co-Chair)	Ph.D., Personal Financial Planning	2024
Jodi Krausman (Co-Chair)	Ph.D., Personal Financial Planning	2024
Julie Mull	Ph.D., Personal Financial Planning	2023
Travis Sholin	Ph.D., Personal Financial Planning	2022
Derek Sensenig (Co-Chair)	Ph.D., Personal Financial Planning	2021

Committee Member:

Christina Lynn	Ph.D., Personal Financial Planning	2023
Mindy Joseph (Use of SEM)	Ph.D., Personal Financial Planning	2023
Ives Machiz (Use of SEM)	Ph.D., Personal Financial Planning	2023
Josh Harris (Use of SEM)	Ph.D., Personal Financial Planning	2023
Eric Ludwig (Use of SEM)	Ph.D., Personal Financial Planning	2023
Gina Hall (Use of SEM)	Ph.D., Personal Financial Planning	2023
Wendy Usrey (Use of SEM)	Ph.D., Personal Financial Planning	2023
Shelitha Smodic	Ph.D., Personal Financial Planning	Expected 2025

HONORS & ACHIEVEMENTS

Kansas State University

Mirabito Faculty Excellence in Teaching Award — 2024

CFP Board 2023 Academic Research Colloquium Best Paper in Financial Planning Practice Award — 2023

K-State PFP Department's Ann Coulson Teaching Award for UG Teaching — 2022

Association for Financial Counselors and Planning Educators (AFCPE) 2019 *Outstanding Symposium Research to Practice Award.* — 2019

Texas Tech University

Personal Financial Planning Association's (PFPA) 2018-2019 Instructor of the Year Award (as voted by students), presented at the TTU PFP Opportunity Days Awards Banquet — 2019

Journal of Financial Planning's Montgomery-Warschauer Award — 2018

Kansas State University (student awards)

K-State Alumni Association's Graduate Student Award for Outstanding Leadership and Service, presented at the K-State Alumni Association's Awards & Recognition Luncheon — 2019

College of Human Ecology and School of Family Studies and Human Services' 2017-2018 Outstanding Graduate Student Award, presented at the Graduate School's Awards & Recognition Ceremony — 2018

School of Family Studies and Human Services' 2017-2018 Overall Outstanding Graduate Student Award, presented at the College of Human Ecology's Graduate Student Awards & Recognition Ceremony — 2018

Institute of Personal Financial Planning's 2017-2018 Outstanding Graduate Student Award, presented at the 2018 Institute of Personal Financial Professionals Summit — 2018

Timothy R. Donoghue Graduate Scholarship — 2015-2018

Institute of Personal Financial Planning Practitioner-Oriented Poster Forum – 1st, 2nd, & 3rd Place Posters — 2017

Department of Family Studies & Human Services Travel Scholarship — Fall 2017

Kansas State Graduate Student Council Travel Scholarship — Fall 2017

Kansas State Graduate Student Council Travel Scholarship — Spring 2017

Hoeflin (Ruth) Home Economics Scholarship	2016-2017
Department of Family Studies & Human Services Travel Scholarship	Fall 2016
College of Human Ecology Travel Scholarship	Fall 2016
College of Human Ecology General Scholarship	Fall 2015
Manus (Helen Jones) Memorial Scholarship	2014-2015
Volunteer Service Award, Financial Planning Association	2014-2015
Student Conference Scholarship, XY Planning Network	2015
Annette Wells Memorial Scholarship, FPA of Greater Kansas City	Fall 2014
Student Conference Scholarship, Financial Therapy Association	2013

PROFESSIONAL SERVICE

Professional Organization - Board Leadership:

Co-Director of Student Mentoring & Career Development, FPA of Greater Kansas City	2020-2022
Treasurer, Financial Therapy Association (FTA)	2015-2017
Secretary, Financial Planning Association (FPA) – NexGen	2015-2016
Marketing & Social Media Coordinator, NAPFA Genesis	2014-2016
Director of NexGen, FPA of Greater Kansas City	2015
Director-at-Large, FPA of Greater Kansas City	2014

Professional Organization - Other:

Academic Editor, *Journal of Financial Planning*	2024-Present
Reviewer, *Financial Services Review*	2023-Present
Reviewer, *Journal of Financial Therapy*	2021-Present
Reviewer, *Financial Services Review*	2020-2021
Reviewer, *Journal of Financial Therapy*	2017-2019
Reviewer, *Financial Services Review*	2018
Reviewer, "Financial decision making." In *Integrated evidence-based financial counseling*. Springer.	2017
Ad hoc referee, FTA Conference	2016
Member, FPA Retreat Conference Task Force	2015

Academic (Faculty):

Director, PFP Undergraduate Program	2022-Present
CHHS Course & Curriculum Committee	2022-Present
CHHS Academic Affairs Committee	2022-Present
Morse Scholarship Review Committee	2022-Present
Member, CHHS College Awards Committee	2019-Present
Faculty Advisor, FPA K-State	2019-2023
PFP Asst. Prof. & Prof. of Practice Search Committee Chair	2023
CHHS Dean Search Committee	2022-2023
Member, PFP Preliminary Exam Committee	2021-2023
Secretary, PFP Department's Advisory Board	2020-2022
Committee Member, K-State's PFP Undergraduate Committee	2019-2022
Member, CHHS Graduate Course Review Committee	2020-2021

Alternate, PFP Preliminary Exam Committee	2019-2020

Academic (Student):

President, K-State Graduate School Council (GSC)	2017-2018
Graduate Student Committee Member, PFP Fee Proposal Committee	Spring 2018
President-Elect, K-State GSC	2016-2017
President's Cabinet, K-State Student Governing Association (SGA)	2016-2017
Grievance Committee, K-State Graduate School	Spring 2017
Selection Committee, K-State Alumni Association's Graduate Student Awards	Spring 2017
Co-Chair, Professional Development Committee, K-State GSC	2015-2016
Member, Research Forums Committee, K-State GSC	2015-2016

PROFESSIONAL ASSOCIATIONS

Academy of Financial Services (AFS)	2016-Present
National Association of Personal Financial Planners (NAPFA)	2013-Present
Financial Planning Association (FPA)	2012-Present
Financial Therapy Association (FTA)	2013-2022
Association for Financial Counselors and Planning Educators (AFCPE)	2017-2019

MEDIA APPEARANCES

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