Katherine S. Mielitz, Ph.D., AFC®, CDP®

918 N Martin Luther King Jr. Drive
785-532-2889 (office)
mielitz@k-state.edu

Award-winning Financial Educator, Mentor, and AFC®

As a career professional in the financial services industry, my emphasis is on building relationships and mentoring early career professionals. I strive to identify/construct the right programming to meet the needs of my clients as well as the counselors on my team. The client comes first. I endeavor, and train my team, to meet the clients where they are, wherever they are, on the financial continuum. I apply a culture of respect and belonging in continuing to advance an established, and reputable, financial counseling and education program.

Areas of Research Interest

Financial capability of vulnerable populations, financial inclusion, incarcerated/ transitioning populations, financial literacy/knowledge, financial socialization, and vulnerable populations.

Education

Ph.D. (2018) Kansas State University, Personal Financial Planning
M.A. (2004) University of Wyoming, Communications
B.A. (1999) University of Wyoming, Broadcasting

Professional Designations

Accredited Financial Counselor (AFC®)
June 2009 to Current

Certified Diversity Professional (CDP®)
November 2023 to Current

Professional Memberships

Association for Financial Counseling and Planning Education (AFCPE)
Society for Diversity

Employment and Relevant Experience (Academic)

Kansas State University
Powercat Financial—Executive Director
Professor of Practice—Personal Financial Planning
July 2024-Current

- In development

Oklahoma State University
Assistant Professor—Family Financial Planning
August 2018-December 2021

- Conduct focused research to expand multidisciplinary body of literature

in Family Financial Planning.
- Develop engaging curriculum for students in Human Development and Family Sciences major.
- Teach Family Financial Planning courses and other courses as assigned.
    - Family Resource Management (Fall 2018); 9 total students
        - Overall Instructor Score: 4.96/5
        - Overall Course Score: 3.84/4
    - Fundamentals of Financial Planning (Fall 2018); 1 student
    - Family Resource Management (Spring 2019); 21 total students
        - Overall Instructor Score: 4.88/5
        - Overall Course Score: 3.68/4
    - Investing for the Family's Future (Spring 2019); 4 total students
        - Overall Instructor Score: 4.82/5
        - Overall Course Score: 3.71/4
    - Financial Perspectives throughout the United States (Spring 2019); 4 total students
        - Overall Instructor Score: 4.93/5
        - Overall Course Score: 4/4
    - Family Resource Management (Fall 2019); 11 total students
        - Overall Instructor Score: 4.98/5
        - Overall Course Score: 3.95/4
    - Financial Counseling (Fall 2019); 11 total students
        - Overall Instructor Score: 4.98/5
        - Overall Course Score: 3.94/5
    - Financial Perspectives throughout the United States (Spring 2020); 27 total students
        - Overall Instructor Score: 4.65/5
        - Overall Course Score: 3.28/4
    - Insurance Planning for Families (Spring 2020); 26 total students
        - Overall Instructor Score: 4.92/5
        - Overall Course Score: 3.94/4
    - Financial Perspectives throughout the United States HONORS (Fall 2020); 19 total students
        - Overall score: 4.51/5
    - Financial Health for Helping Professionals (Fall 2020) 13 total students
        - Overall score 4.7/5
    - Financial Health for Helping Professionals (Spring 2021) 12 total students
        - Overall score 4.7/5
    - Financial Perspectives throughout the United States HONORS (Spring 2021) 30 total students
        - Overall score 4.8/5
    - Financial Perspectives throughout the United States HONORS (Fall 2021) 22 total students
        - Overall score 4.87/5
    - Family Resource Management (Fall 2021) 20 total students
        - 4.63/5
- Developed and Launched Financial Perspectives course content and curriculum;

Approved for Diversity and Social Science General Education designations, Spring 2019.

- Approved Honors Course for Fall 2020
  - *Financial Perspectives throughout the United States* (Diversity Gen Ed)
    - *Course Description*: An introduction to the personal relationship with money focusing on similarities and differences between Race/Ethnicity, Sex/Gender, Aging, Religion, Family Structure, and Wealth/Wealth Disparity. This course provides an overview of history, present day application, seeks solutions, and encourages reflection on the personal and societal relationships with money.
    - *Course Objectives*: Understand and explain the historical and present-day financial implications of race, ethnicity, sex, gender, aging, religion, family structure, and wealth and wealth disparity when considering personal financial resources. Gather and interpret information, respond and adapt to changing situations, make complex decisions, solve problems, and evaluate personal experiences and behaviors.
    - This course offers an introductory look at how history has shaped our financial behaviors of today and how our financial behaviors and those of others can shape our tomorrow. Financial Perspectives takes an oft-taboo subject and encourages relevant discourse and investigation into how differences in financial habits and behaviors are not always negative, but guided by history, informed by the present, and shape our future as individuals and as a country.

- Developed Financial Health course content and curriculum.
  - *Financial Health* (Foundational Personal Finance)
    - An introduction to personal finance through spending plans/budgeting, credit, insurance, investing, retirement planning, estate planning, and savings habits.
- Gather, assess, and use data that identifies course strengths and areas for improvement.
- Gather, assess, and use data to create relevant research to influence the practice of credentialed personal financial professionals.
- Mentor and supervise two teaching and research assistants.
- Conduct focused research to expand multidisciplinary body of literature in Family Financial Planning.
- Manage four university service roles with teaching and research duties.
- Seek and secure extramural funding for research initiatives; (2013-2017: $38,500).
  - Creative Component Supervisor (GPIDEA)—Five (5) students

Graduate Research Assistant—School of Family Studies and Human Services, Kansas State University, Manhattan, KS (Spring 2017—Fall 2017)

- Represented Kansas State University Extension at CFA and America Saves Week meetings (December 2016).
- Developed Pet Financial Fact Sheet.

- Developed questions for Health Insurance Literacy Focus Groups
- Designed SMS/MMS text messaging campaign.
  - Originated questions.
  - Developed Decision tree for responses after return texts.
- Provided social media (Twitter) support to promote America Saves Week events.
- Provided social media (Twitter) support to promote Extension and other financial awareness events.

Graduate Teaching Assistant—School of Family Studies and Human Services, Kansas State University, Manhattan, KS (Fall 2016 – Fall 2017)

- Provided instructional support as needed for CFP® Estate Planning, Investing for the Family's Future, Case Studies, and Financial Ethics and Mediation courses.
- Graded student assignments as directed.
- Worked with students to ensure understanding of material and ability to apply weekly learning objectives.
- Corresponded with students and professor to ensure questions are appropriately addressed.

Instructor—School of Family Studies and Human Services, Kansas State University (Fall 2016)

- Money 101, 8-week online course
- Developed interactive modules for increased student discussion of relevant financial topics.
- Overall effectiveness as a teacher score 4.5 (5 pt. scale)

Employment and Relevant Experience (Industry)
Financial Counseling Program Manager
Beyond Finance
Remote—May 2023-January 2024

- Created and led first of its kind financial counseling program for national debt resolution company.
  - Trained AFC® professionals on financial counseling in the debt settlement industry.
- Developed programming to meet the needs of current Beyond clients.
- Contributed to scaling/growth discussions.
- Created and managed filing system.
- Oversaw client assignments including no-shows, cancellations, and reschedules.
- Interviewed, hired, and trained new financial counselors.
- Mentored and supervised financial counselors.
- Identified relevant professional development opportunities for team.
- Conducted over 200 one-on-one financial counseling sessions.
- Contributed to more than 10 published media articles and/or television segments.
- Conducted weekly 1:1 mentorship and supervisory meetings.
- Conducted team meetings and training as appropriate.

Special Programs Manager

Association for Financial Counseling and Planning Education (AFCPE®)
Remote—January 2022-May 2023

- Oversaw and managed daily operations of special programs/grant-funded programs.
  - Created communication strategy for national awareness of organization.
  - Developed outreach to and support of diverse body of scholarship recipients.
  - Reviewed and assisted in award Capacity Building Scholarships.
- Collaborated with Executive Team for accounting of grant funding.
  - Co-managed close out of grant; approximately $300,000 in grant funding (2022).
  - Managed funds reserved for growing accessibility ($25,000) and DEI initiatives ($8,000).
    - Strengthened accessibility for Deaf candidates.
    - Identified needs to increase accessibility for Blind candidates.
- Managed daily operations of Registered Education Programs.
  - Oversaw and evaluated submitted paperwork to meet company requirements.
  - Communicated changes in programming and fees to Registered Education Program points of contact.
  - Presented virtually to national collegiate programs regarding AFCPE and the AFC designation.
- Managed contracts of short-term and long-term contract employees.
- Led in-person and virtual outreach to grow impact of AFCPE.
- Partnered with Communications team to lead networking initiatives at conferences.
- Represented AFCPE at regional and national conferences (presenter and exhibitor).
- Conducted in-person and virtual education for Strada Education Network HBCU Scholar Leaders.
- Coached, cross-trained, and supervised Special Programs Coordinator.
- Provided quality and timely feedback and employee performance reviews.

Director of Financial Counseling and Education
Family Promise of the Mid-Willamette Valley—
Salem, OR June 2016-June 2018

- Utilized practical research-based solutions to develop a robust financial education curriculum that supported over 500 families facing homelessness.
- Led financial coaching sessions for individuals and small groups that helped 95% of families move from homeless to stability.
- Developed and maintained impeccable records and reporting procedures for Family Promise staff that ensured 100% compliance with reporting procedures.

Financial Literacy Instructor (Volunteer)
Augusta Transitional Center
May 2013 to November 2015

- Developed and presented a basic financial education curriculum specific to the re- entry population.
- Provided a bi-weekly, two-hour financial literacy class to inmates transitioning from prison into the Georgia Department of Corrections Work Release Program.

- Conducted IRB and GA DOC approved research to inform curriculum.

Financial Literacy Instructor (Volunteer)
Augusta Day Reporting Center
April 2013 to October 2015

- Developed and presented a basic financial education curriculum.
- Provided a monthly, 90-minute financial literacy class to recovering substance abusers in the Georgia Department of Corrections Substance Abuse Treatment program.

Consumer Credit Counseling Service
Branch Manager/Community Educator—Augusta,
GA February 2013 to December 2013

- Supervised and provided leadership for 6 total employees.
- Demonstrated conflict resolution skills
  - Provided branch employees opportunities to provide confidential feedback
  - Communicated branch needs and wishes with home office
- Provided credit counseling and worked with clients to determine eligibility for Debt Management Plans.
- Developed promotion and marketing to support organization and financial education programming.
- Spearheaded community financial education programming.
- Provided quality and timely feedback and employee performance reviews.

Zeiders/Military Health Net (MHN)
Sub-Contractor/Personal Financial Counselor—Fort Hood, TX and Augusta, GA
March 2009-December 2014

- Provided over 50 presentations on pre-and post-deployment financial health topics.
- Conducted one-on-one financial counseling with over 500 service members and their families.
- Networked to identify appropriate pre-and post-deployment resources.
- Led networking efforts to expand reach of Financial Counseling program across Post.

Rivermark Community Credit Union
Fraud Investigator/Collector II—Beaverton,
OR September 2007-September 2008

- Investigated fraud perpetrated against the credit union.
- Worked with local police force to collect evidence and build cases.
- Trained 40 credit union personnel about fraud detection.
- Served as Department Leader in collaborating to develop Department Vision Statement.
- Provided support to Collections department staff.

Rivermark Community Credit Union
Bankruptcy Specialist/Collector II—Beaverton,
OR March 2005-March 2006

- Represented credit union interests in over 400 bankruptcy cases.
- Represented credit union interests at over 100 §341 hearings.
- Collaborated with Collections department attorney on advanced bankruptcy proceedings.
- Provided support to other Collections department staff.

UniWyo Federal Credit Union
Financial Educator and Collections Officer—Laramie, WY
July 1999-June 2004

- Created and grew financial education programming for credit union.
- Provided community financial education, over 20 presentations in two years.
- Successfully completed CUNA Financial Counselor training.
- Conducted 20 one-on-one financial counseling sessions for credit union members.
- Collected past due accounts via cold calls and relevant legal proceedings.
- Supported teller line and member service reps as needed.

Honors and Awards

- Rising Professional—PhD Program, Department of Personal Financial Planning; College of Health and Human Sciences—Kansas State University (2024)
- Nominated for Merrick Foundation Teaching Award—Oklahoma State University (2021)
- Mary Ellen Edmondson Educator of the Year—AFCPE (2020); $500 Cash Award
- Alumni Spotlight—PFP at Kansas State University Fall 2020
- FINRA Foundation Military Spouse Fellowship Mentor of the Year (2019)
- Nominated for Oklahoma State University Inclusive Excellence Award (2019)
- U.S. Army Garrison Ft. Hood Heroes Award Winner
  - Civilian Volunteer of the Quarter (4th Quarter FY 2011)
- FINRA Foundation Military Spouse Fellowship (2008)

Scholarly Activities (projects supported by funding denoted with *)

Peer-Reviewed Publications

Journal Articles

- Mielitz, K., & MacDonald, M. (2022). Social desirability in multivariate context for inmate survey research. *Corrections*, *7*(4), 247-261.
- Tharp, D., Lurtz, M., **Mielitz, K.**, Kitces, M., & Ammerman, A. (2021). *Technology use and time spent in the financial planning process.* Journal of Financial Counseling and Planning.
- Mielitz, K. S., & MacDonald, M. (2021) *Post-release financial intentions of transitional center participants*. Journal of Financial Counseling and Planning, *32*(1), 1-14.
- Mielitz, K. S., & MacDonald, M. (2020) *Social desirability in multivariate context for inmate survey research.* Corrections. Doi: 10.1080/23774657.2020.1789520
- Mielitz, K. S., & Marcum, C. (2020). *A consideration for increasing post-release financial success*. American Journal of Criminal Justice, *45*(5), 955- 969. Doi: 10.1007/s12103-019-09515-2
- Lurtz, M., Tharp, D., **Mielitz, K.**, Kitces, M., & Ammerman, A. (2020). Decomposing the Gender Divorce Gap Among Personal Financial Planners. *Journal of Family and Economic Issues, 41*(1), 19-36. Doi: 10.1007/s10834-019- 09655-x
- Tharp, D., Lurtz, M., **Mielitz, K.**, Kitces, M., & Ammerman, A. (2019).

Examining the Gender Pay Gap Among Financial Planning Professionals: A Blinder-Oaxaca Decomposition. *Financial Planning Review, 2*(3-4). Doi: 10.1002/cfp2.1061

- Mielitz, K. S., Clady, J., Lurtz, M., Archuleta, K. (2019). Barriers to Banking: A Mixed Methods Investigation of Previously Incarcerated Individuals' Banking Perceptions and Financial Knowledge. *Journal of Consumer Affairs, 53*(4), 1748- 1774. Doi: 10.1111/joca.12260*
- Archuleta, K. L., **Mielitz, K**., Jayne, D., & Le, V. (2019). Financial goal setting, financial anxiety, and solution-focused financial therapy (SFFT): A quasi-experimental outcome study. *Journal of Contemporary Family Therapy* (Special Issue). Advanced online publication. Doi:10.1007/s10591-019-09591-0
- Mielitz, K. S., MacDonald, M., & Lurtz, M. (2018). Financial Literacy Education in a Work-Release Program: Investigating Knowledge Gains. *Journal of Financial Counseling and Planning*, *29*(2), 316-327. Doi: 10.1891/1052-3073.29.2.316*
- Mielitz, K. S., Lurtz, M., Clady, J., & Archuleta, K. (2018) After Release: A Qualitative Investigation into the Financial Lives of Former Offenders. *Corrections, 3*(1), 56-71. doi: 10.1080/23774657.2017.1383215*
- Kiss, E., Katras, M. J., Koonce, J., Martin, K., Wise, D., **Mielitz, K**., & Brown, V. (2018). Advancing Methodology: From Concept mapping to mobile Messaging Campaign. *Journal of Human Sciences and Extension, 6*(2). https://www.jhseonline.com/current-issue-5

Fact Sheets for Cooperative Extension

- Mielitz, K., & Kiss, E. (2018) *Dogs, Cats, and Birds, Oh My! A Household Pet Resource and Budget Fact Sheet.* https://www.bookstore.ksre.k-state.edu/pubs/MF3368.pdf

Keynote Presentations *($ cross-listed with Invited Presentations)*

- Mielitz, K. *Panelist* (2022). *Beyond Bars—Financial Inclusion for Justice Involved Individuals*. American Bankers Association Annual Conference. Palm Springs, CA.$

Peer-Reviewed

Presentations

- Reiter, M., Mielitz, K., Chimbane, T. (2024). *Addressing Diversity, Equity, and Inclusion in Financial Planning Education.* Academy of Financial Services, Columbus, OH.
- Mielitz, K. (2023). *Using Race, Gender, and Experiences with Wealth to Inform Personal Finance.* Credit Builders' Alliance Annual Symposium, Washington, D.C.
- Mielitz, K., Clady, J., Taggart-Gatti, M. (2021). *A Qualitative Inquiry into the Impact of COVID-19 on Underrepresented Students' Lived Financial Experiences.* Annual Symposium of the Association for Financial Counseling and Planning Education. Virtual.
- Mielitz, K., Clady, J., Taggart-Gatti, M. (2021). *Underrepresented College*

Students' Lived Financial Experiences at the Beginning of the COVID-19 Pandemic. American Council on Consumer Interests. Virtual.
- Mielitz, K., MacDonald, M., Ratzlaff, B. (2021) *Using Self-Determination Theory to Investigate Financial Well-Being.* American Council on Consumer Interests Annual Conference.
- Mielitz, K., Taggart-Gatti, M., Grabenstetter, S. (2020) *When it Rains, It Pours: Experiencing Financial Shock.* Annual Symposium of the Association for Financial Counseling and Planning Education. Virtual.
- Mielitz, K. (Facilitator and Coordinator) (2020). *Research Snapshots: Telling the Research Story in 3 Minutes with 1 Slide.* Annual Symposium of the Association for Financial Counseling and Planning Education. Virtual.
- Mielitz, K.S. (Facilitator and Coordinator) (2019). *Research Snapshots: Telling the Research Story in 3 Minutes with 1 Slide.* Annual Symposium of the Association for Financial Counseling and Planning Education, Portland, OR.
- Mielitz, K. S., & MacDonald M. (2018). *Post-Release Financial Intentions of Work- Release Participants*. Annual Symposium of the Association for Financial Counseling and Planning Education, Norfolk, VA.
- Mielitz, K. S., Clady, J., Lurtz, M., & Archuleta, K. (2017) *Barriers to Banking: A Mixed-Methods Investigation of Former Offenders' Banking Perceptions and Financial Knowledge.* American Council on Consumer Interests Annual Conference, Albuquerque, NM.
- Archuleta, K., **Mielitz, K. S.**, Jayne, D., & Le, V. (2017) *Financial Goal Setting, Financial Anxiety, and Solution-Focused Financial Therapy (SFFT): A Quasi- Experimental Outcome Study.* CFP Board Academic Research Colloquium for Financial Planning and Related Disciplines, Arlington, VA.
- Mielitz, K. S. (2015). *Financial Education for Prisoners: Program Development and Implementation in a Work-Release Facility.* Annual Symposium of the Association for Financial Counseling and Planning Education, Jacksonville, FL.

Posters
- Mielitz, K. S. (November 2018) *Family and Friends Influence Financial Intentions of Prisoners*. National Council on Family Relations Annual Conference. San Diego, CA.
- Mielitz, K. S., & MacDonald, M. (2016) *Ready for Release? Financial Knowledge of Inmates in a Transitional Center Program.* Annual Symposium of the Association for Financial Counseling and Planning Education, Louisville, KY.

Invited Presentations
- Mielitz, K.S. (Fall 2023). *A practical way to increase the DEI conversation in financial counseling and education.* Association for Financial Counseling and Planning Education (AFCPE), New Orleans, LA.
- Mielitz, K.S. (Fall 2023). *Money Habitudes and YOU!* Strada Education Foundation, Atlanta, GA.
- Mielitz, K. S. (August 2023) *Understanding the Theory of Planned*

Behavior. A presentation to first year PhD Students at Kansas State University, Personal Financial Planning program. (Megan McCoy).

- Mielitz, K.S. (Summer 2023). *Personal Finance for Strada Student Leaders*. Strada Education Foundation, Virtual.
- Mielitz, K.S. (Spring 2023) *Addressing Privilege in the Teaching of Personal Financial Education—Ways to Improve for Strada Student Leaders.* Strada Education Foundation, Virtual.
- Mielitz, K.S. (Fall 2022). *Money Habitudes and YOU!* Strada Education Foundation, Atlanta, GA.
- Mielitz, K.S. (Summer 2022). *Personal Finance for Strada Student Leaders*. Strada Education Foundation, Virtual.
- Mielitz, K. *Panelist* (2021). *Financial Inclusion for Justice Involved Individuals.* Opening Keynote Session. Annual Symposium of the Association for Financial Counseling and Planning Education. Virtual.$

Non-Peer Reviewed

Invited Presentations

- Mielitz, K. S. (August 2023) *Understanding the Theory of Planned Behavior*. A presentation to first year PhD Students at Kansas State University, Personal Financial Planning program. (Morey MacDonald and Megan McCoy).
- Mielitz, K. *Panelist.* (Spring 2023). *Diversitas Forum: Building Careers in Wealth Management.* Virtual. https://diversitasfp.org/events/diversitas-april- forum-building- careers-in-wealth-management-advisory-careers/
- Mielitz, K. S. (August 2022) *Understanding the Theory of Planned Behavior*. A presentation to first year PhD Students at Kansas State University, Personal Financial Planning program. (Morey MacDonald and Megan McCoy).
- Mielitz, K. *Panelist* (2022). *Beyond Bars—Financial Inclusion for Justice Involved Individuals*. American Bankers Association Annual Conference. Palm Springs, CA.
- Mielitz, K. S. (August 2021) *Understanding the Theory of Planned Behavior*. A presentation to first year PhD Students at Kansas State University, Personal Financial Planning program. (Morey MacDonald and Megan McCoy).
- Mielitz, K.S. (Spring 2021) *Personal Finance Q&A.* Office of First Year Success Money Talks Series—Spring Semester. Oklahoma State University.
- Mielitz, K.S. (Spring 2021) *Personal Finance—Getting Back on the Horse and Helping Others do the Same*; Undergraduate Admissions Team. Oklahoma State University.
- Mielitz, K.S. (Spring 2021) *It's Tax Time!* For Undergraduate Admissions Team. Oklahoma State University.
- Mielitz, K.S. (Fall 2020) Recorded Q & A for 4813, *Dying, Death, and Bereavement.* (Alex Bishop), Oklahoma State University.
- Mielitz, K.S. (Fall 2020) *Money Habitudes and Graduate Students*. Hosted by the Graduate College. November 2020. (Carol Powers), Oklahoma State University.
- Mielitz, K.S. (Fall 2020) *Spending Planning for Freshmen.* Office of First

Year Success Money Talks Series—Fall Semester (Jake Walters). September 28-29 (Live Zoom presentation for two groups). Oklahoma State University.

- Mielitz, K.S. (Fall 2020) *Graduate Student Finances Q & A*. Hosted by the Graduate College. September 2020. (Carol Powers), Oklahoma State University.
- Mielitz, K.S. (Fall 2020) *Tips for the First Year.* Recorded presentation speaker for HS 1112 (6 sections—Bellah, Taggart, Price, Eisensmith, Little, Queen), Oklahoma State University.
- Mielitz, K. S. (August 2020) *Understanding the Theory of Planned Behavior*. A presentation to first year PhD Students at Kansas State University, Personal Financial Planning program. (Morey MacDonald and Megan McCoy).
- Mielitz, K. S. (March 2020) *Early Career Financial Planning for ROTC.* Invited Speaker for AERO 3103/AERO 4103 (LTC Ryan Cox, Commander).
- Mielitz, K. S. (November 2019). *Budgeting and Later in Life Financial Considerations: Creating a Plan*. Guest speaker for Northeast Salem Lions Club; Salem, OR.
- Mielitz, K.S. (November 2019) *Developing a Relationship with Money.* Invited speaker for HS 1112 (6 sections—Bellah, Taggart, Price, Eisensmith, Little, Queen), Oklahoma State University.
- Mielitz, K.S. (November 2019) *Personal Financial Planning for Sorority Members*. Invited speaker for Delta Delta Delta Chapter at Oklahoma State University.
- Mielitz, K.S. (October 2019). *Personal Finance for Middle School Students*. Presentation to 5 classes (Tara Hardeman). Mustang Middle School.
- Mielitz, K.S. (October 2019). *Family Financial Resilience.* Presentation for Family Resilience Center (Harrist and Merten). Tulsa Campus.
- Mielitz, K.S. (October 2019). *Money Habitudes for 2nd and 3rd Year Veterinary Students*. (Liza Marhanka), Oklahoma State University.
- Mielitz, K.S. (September 2019) *Personal Finance Behaviors in the Workplace.* Guest speaker for HDFS 2523 (Professional Skills—Kris Struckmeyer), Oklahoma State University.
- Mielitz, K.S. (September 2019) *Budgeting*. Guest speaker for First Year Success' Money Talks Series (Jake Walters), Oklahoma State University.
- Mielitz, K.S. (August 2019) *Creating a Research Path as a PhD Student*. Guest speaker for HS 6993 (PhD Seminar—Christine Johnson), Oklahoma State University.
- Mielitz, K.S. (August 2019) *Let's Talk Money Matters.* Guest speaker for HDFS Graduate Student Retreat (Charles Hendrix/Ragan Jessell), Oklahoma State University.
- Mielitz, K.S. (August 2019) *Financial Management.* Guest speaker for Class of 2023 Center for Veterinary Health Sciences (Anna Teague), Oklahoma State University.
- Mielitz, K.S. (April 2019) *Leaving a Legacy: Estate Planning.* Guest speaker for Intergenerational Relationships (Dr. Alex Bishop), Oklahoma

State University.

- Mielitz, K.S. (April 2019) *Building Financial Resilience*. Guest speaker for Risk and Resilience (Dr. Carolyn Henry and Jeremiah Grissett), Oklahoma State University.
- Mielitz, K.S. (November 2018) *Understanding the Importance of Estate Planning.* Guest speaker for Aging (Dr. Alex Bishop), Oklahoma State University.
- Mielitz, K. S. (September 2018) *Considerations for Mental Health Providers: Best Practices, Financial Situations, and Resources.* Guest speaker for Marriage and Family Therapy Clinic Staff (Dr. Todd Spencer), Oklahoma State University.
- Mielitz, K. S. (April 2018). *Understanding Our Emotions and Money*. Guest speaker for Northeast Salem Lions Club; Salem, OR.
- Mielitz, K. S. (March 2018). *Understanding Our Emotions and Money*. Guest speaker for Alpha Delta Kappa Sorority; Salem, OR.
- Mielitz, K. S. (November 2017). *Service and Ethics in Georgia Banks: A 15-Bank Case Study*. Guest speaker for Financial Ethics and Mediation; Instructor Dr. Ron Sages.
- Mielitz, K. S. (June 2017) *Providing a Hand-Up: Working with Underserved Populations.* FPA Connect Webinar; http://fpa.adobeconnect.com/ppnzuuzu8tox/
- Mielitz, K. S. (April 2017) *Later in Life Financial Issues.* Guest speaker for the Northeast Salem Lions Club; Salem, OR.
- Mielitz, K. S. (April 2017) *Estate Planning for Retired Educators.* Guest speaker for Alpha Delta Kappa Sorority; Salem, OR.
- Mielitz, K. S. (December 2015) *Service and Ethics in Georgia Banks: A 15-Bank Case Study.* Guest speaker for Financial Ethics and Mediation; Instructor Dr. Ron Sages.

Presentations

- Mielitz, K.S., & Marcum, C. (2019). *Investigating Post-Release Financial Success.* Academy of Criminal Justice Sciences Annual Conference, Baltimore, MD.
- Mielitz, K. S., Lurtz, M., Clady, J., & Archuleta, K. (2017) *After Release: A Qualitative Investigation into the Financial Lives of Former Offenders.* Academy of Criminal Justice Sciences Annual Conference, Kansas City, MO.
- Mielitz, K. S., & MacDonald, M. (2016) *Ready for Release? Financial Knowledge of Inmates in a Transitional Center Program.* Southern Criminal Justice Association Annual Conference, Savannah, GA.

Posters

- Mielitz, K. S. (2016). *Ready for Release? Financial Knowledge of Inmates in a Transitional Center Program.* Kansas State University, Practitioners Forum— Poster Presentation, Manhattan, KS.
- Mielitz, K. S., Lurtz, M., Clady, J. (2016) *After Release: A Qualitative Investigation into the Financial Lives of Former Offenders.* Kansas State University, Practitioners Forum— Poster Presentation, Manhattan, KS.

- Mielitz, K. S. (2016). *Ready for Release? Financial Knowledge of Inmates in a Transitional Center Program.* College of Human Ecology Graduate Student Research and Creative Scholarship Forum, Manhattan, KS (virtual appearance).
- Mielitz, K. S. (2016). *Financial Education for Prisoners: Encouraging Practitioner Involvement*. Poster Presentation. Kingdom Advisors, Orlando, FL.
- Mielitz, K. S. (2015). *Financial Education for Prisoners: Preliminary Results in Program Development and Implementation in a Work-Release Facility.* Poster Presentation. Southern Criminal Justice Association, Charleston, SC.
- Mielitz, K. S. (2015). *Financial Education for Prisoners: Encouraging Practitioner Involvement*. Kansas State University, Practitioners Forum—Poster Presentation, Manhattan, KS.

Media Appearances

- Navigating Cultural Differences; AFCPE's Real Money Real People podcast; June 2024
- 4 Simple Ways for Seniors to Consolidate Debt; CBS News Money Watch; June 2024
- WalletHub: Best Checking Accounts, Ask the Experts; June 2024
- Industry Voices That "BNPL Is Definitely Not a Dying Trend" as Hype Remains; The FinTech Times; February 2024
- Need to Pay Off Credit Card Debt? Stop Making These Mistakes; CNET Money; February 2024
- 5 surprising ways to save more money, according to the experts; CBS News Money Watch; December 2023.
- 26% of Americans Will Spend Over $1,000 on Holiday Travel This Year, Survey Finds; Yahoo Finance; December 2023.
- 8 Money Traps that Come Around Every October; Yahoo Finance, October 2023.
- 7 Easy Ways to Save $5000 on a $30k to $50k Salary; GOBankingRates, October 2023.
- North Jersey's WRNJ Radio Speaks with Dr. Kate about Debt Resolution, https://www.beyondfinance.com/newsroom/north-jerseys-wrnj-radio-speaks-with-dr- kate-about-debt-resolution/, September 2023.
- Is Debt Relief Worth It? Here's What Experts Say; CBS News Money Watch; September 2023.
- Judgment Free Financial Help with Kate Mielitz; Lifeblood Podcast, September 2023.
- Experts: 6 Biggest Money Mistakes Married Couples Make; GOBankingRates, May 2023
- 3 Steps to Lower the Cost of Your Debt; NerdWallet; September 2022.
- How to Budget Realistically for Home Repairs, Associated Press, August 2022.
- When is it OK to be Selfish with Your Money? Associated Press, August, 2022.
- Real Money, Real Experts; AFCPE Podcast, July 2022.
- Revolving Credit vs. Installment Credit: What You Need to Know; Opploans.com; March 2022.
- 7 Steps to Make Any Financial Goal Easier to Achieve, U.S. News

Money, November 2021.

- Buy Now, Pay Later. (November 2021). TIME. https://time.com/6107963/buy-now- pay- later-holiday-shopping/.
- Alumni Spotlight Kansas State University Personal Financial Planning (November 2020) https://enewsletters.k-state.edu/financialplanning/alumni-spotlight-kate-mielitz/
- Featured in WalletHub's "2020 Military Money Survey" (November 2020) https://wallethub.com/blog/veterans-day-money- survey/53825#expert=Katherine_(Kate)_S._Mielitz
- Behavioral Finance Techniques Advisors are Using in 2020; U.S. News and World Report (October 2020)
- Featured in Personal Finance for PhDs (February 2020) http://pfforphds.com/three- financial-strategies-every-early-career-phd-should-employ-with-kate-mielitz-phd- afc/
- Featured in WalletHub's "2020's Best Places to Get Married: Ask the Experts" (January 2020) https://wallethub.com/edu/best-places-to-get-married/18721/#
- Featured interview for FINRA Foundation https://twitter.com/FINRA/status/1200151932280745995 (November 2019)
- Cited in Nature Magazine https://www.nature.com/articles/d41586-019-02047-z (July 2019)
- Cited in Financial Advisor News https://www.fa-mag.com/news/do-men-and- women- advisors-get-equal-pay-for-equal-work-51017.html (August 2019)
- Podcast interview for Money Savage https://www.podbean.com/media/share/pb-qij34-af8bb5?utm_campaign=u_share_ep&utm_medium=dlink&utm_source=u_share#.XQDfn d2zgWw.twitter (June 2019)
- Featured interview for FINRA Foundation https://youtu.be/GaBFNtWGyEI (June 2019)
- Featured interview for FINRA Foundation https://www.youtube.com/watch?v=j9ewT- uAY9I; https://twitter.com/FINRA/status/1075084873294077953 (December 2018)
- Featured bi-weekly on MomsEveryday, CBS affiliate station; to date approximately 90 aired segments to date (December 2013-December 2018), Augusta, GA and surrounding areas.
- Featured on Sound Living Radio Program; Saving and America Saves Week; February 10, 2017. http://www.ksre.k-state.edu/news/radio-network/sound-living- mp3/SL- 021017.MP3
- Featured in Prosperity Now (formerly CFED) blog post March 10, 2017; https://www.prosperitynow.org/articles/how-financial-capability-and-education-can-help- underserved-communities-kate-mielitz

<u>Professional and Community Service</u> (Academic)

- AFCPE Board of Directors, 2021.
- Editorial Board Journal of Financial Counseling and Planning (2020-current)
- Peer Reviewer—Journal of Family and Economic Issues (2019-2021)
- Peer Reviewer—Journal of Financial Therapy (2018-2020)
- Financial Literacy Story Reader (Sammy's Big Dream by Sam X. Renick)— Sangre Ridge Elementary; Mrs. Kaehler's class (April 2019).
- Peer Reviewer—Journal of Financial Counseling and Planning (2017-current)
    - Approximately one review per semester
- Association for Financial Counseling and Planning Education (AFCPE)
    - AFCPE Rubric Review Team (part of Symposium Task Force) (2020)
    - AFCPE Bridging the Gap (Research) Task Force (2018-2023)
    - Session Presider—AFCPE Symposium, Virtual (November 2021)
    - Session Presider—AFCPE Symposium, Virtual (November 2020)
    - Session Presider—AFCPE Symposium, Portland, OR (November 2019)
    - Session Presider—AFCPE Symposium, Norfolk, VA (November 2018)
    - Session Discussant—AFCPE Symposium, Norfolk, VA (November 2018)
    - Session Presider—AFCPE Symposium, Louisville, KY (November 2016)
    - AFCPE Career Task Force Committee (2016-2018)
    - AFCPE Competitive Advantage Task Force Committee (2017-2018)
    - Peer Reviewer for AFCPE *Financial Counselor of the Year* (2023)
    - Peer-Reviewer for AFCPE *Practitioner Paper Submissions* AFCPE Symposium (2019)
    - Peer-Reviewer for AFCPE *Practitioner Paper Submissions* AFCPE Symposium (2018)
    - Peer-Reviewer for AFCPE *Research Paper Submissions* AFCPE Symposium (2017)
    - Peer-Reviewer for AFCPE *Educator of the Year Award* (2015)
    - Peer-Reviewer for AFCPE *Practitioner Paper Submissions* AFCPE Symposium (2015)
- American Council on Consumer Interests (ACCI)
    - Peer-Reviewer for ACCI (2018-2021)
    - Session Presider—ACCI conference, Albuquerque, NM (March 2017)
- Interfaith Hospitality Network—Volunteer Financial Counselor and Educator, Salem, OR (April 2016- May 2017)
- Delta Delta Delta Finance Specialist for Adelphi, Syracuse, and Stockton Chapters (NE Region) (March 2016- February 2019)
- Delta Delta Delta Finance Adviser for Wyoming (Theta Eta Chapter) (January 2020- March 2022)

Mentorship

- AFCPE MentorConnect Mentor—2 mentees (Fall 2023)
- 3 PhD Students, K-State; Research (Fall 2018-Fall 2019)
- 2 GRA/GTA Students (January 2020-2021)
- AFCPE Student Mentor—2 students (November 2019)

<u>Organizational Service</u>

Department

- Scholarship Committee (2020-2021)
- Who Are We? Committee Facilitator (Spring 2019)
    - Committee Member (Fall 2019-Spring 2020)
- HDFS Club Advisor (2018-2021)
- HDFS Recruitment and Retention Committee (2018-2020)
- HDFS Undergraduate Curriculum Committee (2018-2019)

College

- See Also Invited Presentations
- Student Affairs Committee (Fall 2020-2021) Chair (2020-2021 School Year)
- Trailblazer Recruitment Committee (Fall 2020-Spring 2021)
- Center for Healthy Living (Spring 2020-Spring 2021)
- Book Discussion with HDFS Freshmen students (two one-hour sessions) Invited by Dr. Shiretta Ownbey (September 2019).
- Book Discussion with DHM freshmen students (two one-hour sessions) Invited by Dr. Shiretta Ownbey (September 2018)
- AED Training (Fall 2018)
- Participated in research project examining effect of students' co-curricular activities on their career readiness competencies (Brecca Farr qualitative research; May 2019)
- Voted in 2019 Spring Undergraduate Scholar's Forum
- Attended and voted in 3MT competition (Spring 2019).

University

- See Also Invited Presentations
- Graduate College—Money Habitudes (November 2020); Contact: Carol Powers
- Graduate College—Money Talk (September 2020); Contact: Carol Powers
- Financial Literacy Week (February 2020)
- Financial Literacy Week (April 2019)

<u>Professional and Community Service</u> (Non-academic)
Education Advisory Board—Tourette Association of America
Board Member
August 2020-present

Tourette Association of America—Oklahoma
Chapter State of Oklahoma
Vice President
October 2019-December 2021