# ROBERT O. WEAGLEY, Ph.D., CFP®

**1701 Oakwood Court**
**Columbia, MO 65203**
**573-445-9207(H)**
**573-882-9651(0)**
**weagleyr@missouri.edu**


## EDUCATIONAL BACKGROUND

### Academic Degrees

| | |
|---|---|
| Ph.D. (1985) | Cornell University, Ithaca, NY |
| Major Area: | Consumer Economics and Housing |
| Minor Areas: | Economics |
| | Finance |
| Dissertation: | Mortgage Default in a Variable Rate Mortgage Market |

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|---|---|
| M.S. (1976) | University of Missouri-Columbia, MO |
| Major Area: | Consumer and Family Economics |
| Thesis: | Information Needs of Consumers |

| | |
|---|---|
| B.S. (1974) | University of Missouri-Columbia, MO |
| Major Area: | Sociology (with Honors) |

### Professional Certification

| | |
|---|---|
| CFP (1989) | Certified Financial Planner |
| | Certified Financial Planner Board of Standards, Inc., Denver, CO |

## PROFESSIONAL EMPLOYMENT

### Full-Time Faculty Positions

| | |
|---|---|
| 2002 - present | Chair<br>Personal Financial Planning<br>University of Missouri-Columbia |
| 1990 - 2002 | Associate Professor<br>Consumer and Family Economics<br>University of Missouri-Columbia |
| 1984 - 1990 | Assistant Professor<br>Consumer and Family Economics<br>University of Missouri-Columbia |
| 1984 - 1987 | State Extension Specialist<br>Consumer and Family Economics<br>University of Missouri-Columbia |
| 1976 - 1978 | Lecturer of Consumer Studies<br>Mount Saint Vincent University<br>Halifax, Nova Scotia, Canada |

**Other Employment**

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|---|---|
| 1999-Present | Registered Investment Advisor<br>Sundvold Financial, LLC<br>Columbia, MO 65203 |

**Summer Appointments**

| | |
|---|---|
| 1981 | Research Assistant (.50 FTE)<br>Cornell University |
| 1980 | Lecturer of Agricultural Economics<br>University of California-Davis |
| 1977 | Lecturer of Consumer Studies<br>Mount St. Vincent University<br>Halifax, Nova Scotia, Canada |

**Fall/Winter Semester Assistantships**

| | |
|---|---|
| 1981 - 1984 | Research Assistant<br>Teaching Assistant (2 semesters)<br>Consumer Economics and Housing<br>Cornell University |
| 1979 - 1980 | Teaching Assistant<br>Agricultural Economics<br>University of California-Davis |
| 1976 | Teaching Assistant<br>Family Economics and Management<br>University of Missouri-Columbia |
| 1976 | Research Intern<br>State Department of Consumer Affairs, Regulation, and Licensing<br>State of Missouri |
| 1974 - 1975 | Research Assistant<br>Family Economics and Management<br>University of Missouri-Columbia |

## COURSES TAUGHT

**Consumer and Family Economics** (University of Missouri-Columbia)

Introduction to Personal Financial Management Services (PFP 2083)
Personal and Family Finance (PFP 2183)
Community Agencies (PFP 2188)
Financial Planning: Investments (PFP 4383)
Consumer and Household Economics (PFP 4387)
Human Resource Development and Its Allocation (PFP 8485)

## ACADEMIC AND PROFESSIONAL HONORS/AWARDS RECEIVED

Member, Gamma Sigma Delta, 1988 - present
Member, Omicron Delta Epsilon, 1976 - present
Flora Rose Fellowship, 1981 – 1982, Cornell University

**PROFESSIONAL MEMBERSHIPS**

Academy of Financial Services
American Council on Consumer Interests
American Economics Association
Association for Financial Counseling and Planning Education
Financial Planning Association

**RESEARCH/WRITING AREAS**

Educational Financing

Household investment and insurance demand

Household production in a human capital framework

**PUBLICATIONS (* Refereed)**

**I. Journals**

**A. Published/In Press**

*Weagley, Robert O. and Eunjeong Huh. "The Impact of Retirement on Household Leisure Expenditures". (2004) Journal of Consumer Affairs. Volume 38:2. Winter 2004.

*Weagley, Robert O. and Eunjeong Huh. "Leisure Expenditures of Retired and Near-Retired Households". (2004) Journal of Leisure Research. Volume 36:1. Spring 2004.

*Cha, Kyung-Wook, Robert O. Weagley, and Laura Reynolds. "Parental Borrowing for Dependent Children's Higher Education", Journal of Family and Economic Issues, Volume 25:1. Spring 2004.

*Cha, Kyung-Wook and Robert O. Weagley. "Higher Education Borrowing", Financial Counseling and Planning, Volume 13 (1), Fall 2002.

*Mueser, Peter R. and Robert O. Weagley "Influence of Child Based Subsidies on the Market for Child Care", Journal of Consumer Affairs, Vol. 32, No.1, Winter 1998.

*Norum, Pamela S., Robert O. Weagley, and Marjorie Norton, "The Effect of Uniform Purchases on the Demand for Non-uniform Apparel Purchases", Family and Consumer Sciences Research Journal, 1998.

*Dillard, Betty G., Robert O. Weagley, and Sandra A. Helmick, "Satisfaction with household production: the effect of time spent in household production by husbands and wives," Journal of Consumer Studies and Home Economics (1992) 16, 363-373.

*Weagley, Robert O. and Gannon, Colleen F., "Investor Portfolio Allocation," (1991). Financial Counseling and Planning, Vol. 2, 1991.

*Weagley, Robert O. and Norum, Pamela S., "Demand for Market Purchased, Home-Producible Commodities," (1989). Home Economics Research Journal, Vol. 18, No. 1, September.

* Weagley, Robert O., "Mortgage Default: A Test of Competing Hypotheses," (1988). Journal of Consumer Affairs, Vol. 22, No. 1, Summer.

* Weagley, Robert O., "Mortgage Default: A Demand Choice Unknown at Purchase," (1987). Service Industries Journal, Vol. 7, No. 3, Summer.

* Weagley, Robert O., “Housing Tenure Choice: A re-examination of the Rural Income Maintenance Experiment,” (1987). North Central Journal of Agricultural Economics, Summer.

Understanding the New Economy, by Alfred L. Malabre, Jr., Book review (1990), Journal of Consumer Affairs, Vol. 24, No. 1, Summer.

## II. Proceedings

*Reynolds, Laura and Robert O. Weagley, Academic Persistence in Higher Education, American Council on Consumer Interests, April 2003.

*Weagley, Robert O. and Stephanie Wilson, "Student Loan Repayment", Consumer Interest Annual, American Council on Consumer Interests, April 2002.

*Cha, Kyung-Wook and Robert O. Weagley, "Student Loans: The Determinants of Borrowing", Consumer Interest Annual, American Council on Consumer Interests, April 2002.

*Weagley, Robert O. and Doug Moore, “Employee Benefits: Knowledge and Satisfaction”, Personal Finances and Worker Productivity, Volume 1, Number 1, 1997.

*Weagley, Robert O., “College Savings: Schooling on Choices”, Family Economics and Resource Management Biennial, 1995, American Association of Family and Consumer Sciences, June 1995.

Weagley, Robert O., “The Role of Family Economists in Developing State Policy”, Consumer Interests Annual, American Council on Consumer Interests, 1995.

*Weagley, Robert O. and John G. Taylor, “The Life of the Wife: The Demand for Life Insurance,” American Council on Consumer Interests annual conference, Toronto, Ontario, Canada, March 1992.

*Weagley, Robert O. and Gannon, Colleen, “Investor Portfolio Allocation: The Demand for Risk,” American Council on Consumer Interests annual conference, Baltimore, Maryland. March 1989.

*“The Use of Extended Data to Proxy Economic Change: An Application to Mortgage Default,” American Council on Consumer Interests annual conference, Poster session, Denver, Colorado. April 1987.

*Weagley, Robert O. and Norum, Pamela S., “Home-Based Business = Home Economics,” American Council on Consumer Interests annual conference, Fort Worth, Texas. March 1985.

“The Current Family Farm Crisis,” American Council on Consumer Interests annual conference, Fort Worth, Texas. March, 1985.

## III. Extension Publications

“Insurance Planning Part 1: Economic Risk Management,” research and development of a videotape and workbook for the Planning Your Financial Future series, 1990.

Weagley, Robert O. and Griffith, Ruth Y., “Keeping a Roof Over Your Head: Consumer’s Guide to Homeowner's Insurance” University of Missouri Extension Guide GH 3423, 1988.

“Today's Mortgage Menu,” University of Missouri Extension Guide GH3346, 1986.

“Personal Consumption and Stress,” University of Missouri Extension Guide GH3930, 1986.

“Risky Business: Household Insurance Planning,” University of Missouri Extension Guide GH3420, 1986.

“Remaining Financially Able When Physically Disabled,” University of Missouri Extension Guide

GH3427, 1986.

"Home Based Business: Is It for You?" University of Missouri Extension Guide MP592, 1986.

Weagley, Robert O. and Crawford, Cynthia, "Farm Family Living Expenses: Taking Control," University of Missouri Extension Guide GH3925, 1985.

**IV. Books/Proceedings**

Weagley, Robert O., "The Mathematics of Taxes", Chapter 10, *The Mathematics of Personal Finance*, E. Thomas Garman and Jing J. Xiao, editors, 1999, 1997.

Hobbs, Daryl and Robert O. Weagley, "The Agricultures of the Middlewest and Their Demographic and Economic Environments", Chapter 1, *Beyond the Amber Waves of Grain*, Paul Lasley, F. Larry Leistritz, Linda M. Labao, and Katherine Meyer, editors, Westview Press, Boulder, CO, 1995.

Weagley, Robert O., "Insurance Counseling," Chapter 9, Financial Counseling, Jerry Mason, editor, 1993.

Israelsen, Craig and Robert O. Weagley, Personal and Family Finance Workbook, 3rd Edition, Kendall-Hunt Publishing, 1994, 1996, 1997, 2000 (reprint), 2002 (reprint), 2005.

Weagley, Robert O., Today's Crossroad, Consumer Credit Counseling of St. Louis, 1993.

Weagley, Robert O., editor, 1990 Annual Proceedings of the Association for Financial Counseling and Planning Education, Columbia, MD, October 1990, 239 pp.

**PRESENTATIONS**

**I. Refereed**

Reynolds, Laura and Robert O. Weagley, Academic Persistence in Higher Education, American Council on Consumer Interests, April 2003.

Weagley, Robert O. and Stephanie Wilson, "Student Loan Repayment", American Council on Consumer Interests, April 2002.

Cha, Kyung-Wook and Robert O. Weagley, "Student Loans: The Determinants of Borrowing", American Council on Consumer Interests, April 2002.

Weagley, Robert O., Yueh-Ju Lin, and Deanna L. Sharpe, "Household Financial Liquidity: Pre- and Post-Retirement", Financial Services Association, October 2001

Poetker, Sara and Robert O. Weagley, "Rent-to-Own: A State by State Comparison", American Council on Consumer Interests Annual Conference, Chicago, IL, March 1999.

Weagley, Robert O. and Doug Moore, "Employee Benefits: Knowledge and Satisfaction", Personal Finance Employee Education National Conference, Roanoke, VA, October 1997.

Weagley, Robert O., "College Savings: Schooling on Choices", Family Economics and Resource Management Biennial, 1995, American Association of Family and Consumer Sciences, June 1995.

Mueser, Peter M. and Weagley, Robert O., "The Impact of Government Subsidies on Child Care Fees," Population Association of America, San Francisco, CA, March 1995.

Weagley, Robert O. and Taylor, John Garret, "The Life of the Wife: The Demand for Life Insurance," American Council on Consumer Interests annual conference, Toronto, Canada, March 1992.

Weagley, Robert O. and Gannon, Colleen F., "Investor Portfolio Allocation: The Demand for Risk," American Council on Consumer Interests annual conference, Baltimore, Maryland. March 1989.

"The Use of Extended Data to Proxy Economic Change: An Application to Mortgage Default," American Council on Consumer Interests annual conference, Poster session, Denver, Colorado. April 1987.

Weagley, Robert O. and Norum, Pamela S., "Home-Based Business = Home Economics," American Council on Consumer Interests annual conference, Fort Worth, Texas. March 1985.

## II. **Invited**

"Millennials and the Instruction of Personal Finance", ACCI Annual Conference, Washington, DC, April 2004.

"YMCA Investment Management", keynote speaker, 2003 YMCA Key Leaders' Conference, Missouri State Alliance, Columbia, MO, November 14, 2003.

"We are the Village People", keynote speaker, 2003 St. Joseph, MO United Way luncheon, February 2003.

"Financial Planning with AIDS", presentation to the attendees of the 1998 and 1997 Mid-Missouri RAIN's *Positive Journey* retreat.

"Pre-retiree Financial Planning", University of Missouri-Columbia, 1988-2002.

"Pre-retiree Financial Planning", Missouri Department of Conservation, 1998,1999

"Financial Record Keeping", Retired University Employees, Finance Group, April 1996.

"Service Learning as a Style of Teaching", *Wakonse Student Welcome*, August 1995.

"Service Learning as a Style of Teaching", *Wakonse Conference on College Teaching*, May, 1995.

"Service Learning - The Agency Perspective", Service Learning Conference, UMC, February 1995.

Weagley, Robert O., "The Role of Family Economics Research in Developing State Policy," American Council on Consumer Interests, Washington, D.C., March 1995.

"Roundtable Discussion on the Teaching of Consumer Micro-economic Courses," American Council on Consumer Interests, Lexington, KY, 1993.

With Jutta Joesch, "Roundtable Discussion on the Teaching of Consumer Theory in Consumer Economics Programs," American Council on Consumer Interests, Toronto, Ontario, Canada, 1992.

Discussant, Refereed Papers Session, American Council on Consumer Interests, Cincinnati, Ohio, April 1991.

"Personal Investment Management", Missouri Women's Network, Columbia, Missouri, November 1990.

"Working in Academe", American Council on Consumer Interests annual conference, New Orleans, Louisiana, March 1990.

"Critique of Evidence of Content and Format of a National Certification of Examination for Financial Counselors," Association of Financial Counseling and Planning Educators Annual Meeting, 1989.

"Sharing Graduate Student/Faculty Research," Midwest Graduate Student Symposium, Columbia, Missouri. May 1986.

"The Current Family Farm Crisis," American Council on Consumer Interests annual conference, Fort Worth, Texas. March 1985.

"Education, Ethics, and Internships," Canadian National Consumer Education Conference, Toronto, Ontario. 1977

"Food: Consumer Rights and Responsibilities," Nova Scotia Dietetics Association, Halifax, Nova Scotia. 1977

"Student Internships in Consumer Affairs," American Council on Consumer Interests annual conference, Atlanta, Georgia, 1976

## III. Service/Extension/Mass-Media Presentations and Interviews

"Insurances you don't need", KMIZ TV, Columbia, MO, July 2004

"Do you need Long-Term Care Insurance", *Today's Health & Wellness*, March/April 2004

"Long-term Care Insurance", Better Homes and Gardens, June 2003.

"Interest Rates and the Consumer", bankrate.com, with Holden Lewis, September 2002.

"529 Plans", The Sun Chronicle, August 2002.

"US Savings Rate", Denver Post, August 2002.

"Roth versus 401k", with Clifton Litton, 401Kafe.com, July 2002.

"All eyes on Greenspan's testimony on Capitol Hill today", The Atlanta Journal-Constitution, July 7, 2002

"Equity Participation", Orlando Sentinel, June 27, 2002

"MOStars", KMIZ TV, June 24, 2002

"Senator Kennedy's Tax Plan", Washington Post, January 2002

"Your 529 Plan", AchieveSolutions.com, January 2002

"Proposed Gasoline Tax and Extension of Sales Tax in Missouri", KMIZ television, January 2002

"Homeowner's Insurance", Smart Money, December 2001.

"Life Insurance", Wall Street Journal, Sunday Edition, November 2001

"Consumer Behavior post-WTC" KBIA Radio with Jason Yount, October 2001.

"Consumer Investing Behavior Following an Attack", CNNfn.com, September 2001.

"A Missouri Recession", Steve Walsh, Missouri-Net radio, September 2001

"Consumer Behavior in Light of Terrorism", Dan Finny, Omaha World-Herald, September 2001

"Consumer Confidence in Missouri", Jim Davis, Kansas City Business Journal, September 2001

"Consumer Behavior - Post WTC", abcnews.com, September 2001

"Consumer Confidence in the aftermath of the World Trade Center", Dianne Stafford, Kansas City Star

"College Student Savings", Carol Watkins, VOX

"Consumer Confidence" KRCG-tv, August 2001

"Educational Funding", Baltimore Sun, August 2001

"Children and Savings", Parent's, July 2001

"Educational Funding", Kansas City Star, August 2001, Gene Meyer interviewer

"Powerball Lottery", KMIZ-tv, August 2001

"Powerball Lottery, KFRU-radio, August 2001

"Educational Funding", ParentGuide, July 2001

"Educational Funding", Chicago Tribune, July 2001

"The Current Stock Market", KNBZ live radio interview, Kansas City, MO

"Credit Use and Gambling", St. Louis Post Dispatch, July 2001

"River-Boat Gambling", St. Louis Post Dispatch, February 2001

"Car Buying", St. Louis Post-Dispatch, February 2001

"Debt-Free and In-Charge", WWNZ-radio (live), Orlando, Florida, November 2000

Several interview with Clifton Litton, 401Kafe.com

Interview with Teresa Geronimo on "Talking with Your Aging Parents" for her book chapter.

Knight-Ridder interview on current investing climate, September 1998

American Banking article interview on Educational IRAs, September 1998. “Saving for College”, Financial *Spectrum* show, Bill Kearney host, WKXL radio, Concord, MA, July 1998.

“The Education IRA”, interview for Individual Investor magazine, June 1998.

“Junk Bonds”, Jim Gallegher’s Your Money Matters, St. Louis Post Dispatch, June 1998.

“Summer Youth Employment”, KMIZ News, May 1998.

Television Interview regarding Protecting Oneself from Downsizing, KMIZ, Columbia, MO, October 1996.

Series of Eight seminars on *Financing Education: Finding the Resources*, St. Louis, St. Peters, Kirksville, St. Joseph, Springfield (2), Sikeston, and Rolla MO, August 1996.

Radio Interviews regarding College Savings: San Diego, CA; KUDL, Kansas City, MO; KMBZ, Kansas City, MO; KFRU, Columbia, MO; KOMX, St. Louis, MO.

Television Interviews regarding College Savings: KMIZ, Columbia, MO; KOMU, Columbia, MO; Missouri Extension “News” Video for Regional Distribution; Bill Flanigan’s Money Management, Pittsburgh, PA

Featured in *Money* magazine article on College Savings, April 1996

Quoted in dozens of newspaper articles across the country on College Savings, 1996

February 1995 “Interest Rates and Families,” KOMU Television Interview.

March 1993 “The Use of Home Equity as a Source of Retirement Income,” Pre-Retirement Seminar, Missouri Cooperative Extension Service.

March 1992 “Tax Tips,” Radio Bites, Agricultural Editor's Office, University of Missouri-Columbia.

March 1991 “The State of Missouri Families”, Missouri Forum, KOMU Television Interview.

January 1991 “Reducing Your 1991 Taxes”, Radio Bites.

February 1990 “Income Tax Cuts” - Twenty-one radio interviews.

Winter 1989-1990 KOMU television interviews on Financial and Investment Planning.

February 1988 “1986 Tax Act Effect on Older Americans,” Missouri Cooperative Extension with Boone County National Bank and AARP.

May-June 1987 Area staff education on “Savings, Investments and Insurance”, conducted in Cameron, Fredericktown, Jefferson City, and Springfield.

August 1987 Area staff education on “Planning Your Financial Future,” in Cape Girardeau, Hannibal, and Columbia.

June 1987 ISE #54, Columbia: 7 hours of instruction in the 1986 Tax Act and Trusts and Estate Planning. Also 4 hours of instruction on applications for the use of the Financial Cookbook software.

October 1986 “Preview of the Planning Your Financial Future,” presented to Family Economics and Farm Management staffs in Region 7.

September, 1986 “Basics of Financial Planning,” Marshall, Carrollton, and Keytesville, Missouri.

September 1986 “Tax Reform and You,” Farm and Home Chats with Linda Benedict.

July 1986 “Love and Money: Realizing Our Goals Together,” Missouri Extension Homemakers Annual Meeting.

June 1986 “Farm Family Goal Setting and Risk Management,” Vocational Agriculture Instructors In-Service, University of Missouri, Columbia.

March 1986 “Living Better on What You Have,” Monticello, Missouri.

March 1986 “Personal Consumption and Stress,” MEHA leader training in Kansas City area.

March, 1986 “Retirement Saving and Investment Management,” Cape Girardeau, Missouri.

February 1986 “Marketing Home Based Business Products” New Madrid, Missouri.

February 1986 “Living Better with Less,” Trenton, Missouri.

November 1985 “Living Better on What You Have,” Carrollton, Missouri.

October 1985 “Planning Fundamentals,” Financial Planning Lecture Series, Kansas City Police Department, Kansas City, Missouri.

October 1985 “The Mortgage Menu” and “Rent Versus Buy,” In-Service Education for Family Economics and Management and Housing and Interior Design area specialists.

August 1985 “The Mortgage Menu,” presentation for continuing education of home economists, Trenton, Missouri.

May 1985 “Home Based Business: An Option,” Farm and Home Chats with Mary Paulsell.

January 1985 “Rental Rights and Responsibilities,” Farm and Home Chats with Mary Paulsell.

January 1985 “Adjustable Rate Mortgages,” local television news interview.

**GRANTS**

Source **State Farm Insurance**
Amount/Purpose $75,000; “Remodel Office for Financial Success”
Date Fall 2004

Source **International Office,**
Amount/Purpose $2,000; “International Scholar: Costa Rica 2000
Date Summer 2000

Source **Vice-Chancellor of Student Affairs**
Amount/Purpose $1,500; "Missouri Outward Bound 1997: An Immersion in Experiential Education"
Date Summer 1997

Source **Missouri Department of Social Services, State of Missouri,** with Peter Mueser
Amount/Purpose $28,174; “Effect of Government Subsidies on Child Care Rates in the State of Missouri”
Date June, 1993 - October, 1993

Source **Missouri Department of Social Services, State of Missouri,** with Pamela Norum and Cynthia Sencindiver
Amount/Purpose $25,000; “Updating the Standard of Need for AFDC Recipients and Estimating the Impact of the New Standard on Missouri's AFDC Caseload”
Date October, 1989 - June, 1991

Source **Agriculture Experiment Station**
Amount/Purpose $27,000; “Household Resource Adjustments in Times of Economic Change”
Date October, 1985 - September, 1990

Source **Bureau of Census**
Amount/Purpose $500; To attend Survey of Income and Program Participation Workshop, Inter-university Consortium for Political and Social Research, University of Michigan
Date June, 1990

Source **Faculty Development Grant, UMC**
Amount/Purpose $2,000; Pursue Certification as a Financial Planner
Date December, 1987 - July, 1989

Source **Missouri Cooperative Extension Service,** with Kevin Moore and David Miller
Amount/Purpose $30,000; “Increasing the Efficiency of Financial Management Practices and Technology in Program Development and Delivery”
Date 1987

Source **Missouri Cooperative Extension Service**, with Eunice Lieurance and Ron Plain
Amount/Purpose $4,000; “Increasing the Effectiveness of Household Goal Attainment”
Date 1987

Source **Extension Service**, United States Department of Agriculture, co-chair Rural Crisis Task Force
Amount/Purpose $96,000, “Rural Crisis Programming”
Date December, 1984

**PROFESSIONAL DEVELOPMENT**

## A. <u>Professional Meetings/Conferences/Workshops</u>

September 2005, National Foundation for Credit Counseling Leaders' Conference, Albuquerque, NM

September 2005, Financial Planning Association, San Diego, CA

April 2005, American Council on Consumer Interests, Columbus, OH

October 2004, Academy of Financial Services, New Orleans, LA

May 2004, Identity Theft Conference, Kansas City, MO

April 2004, American Council on Consumer Interest, Washington, DC

October 2003, Academy of Financial Services, Denver CO

April 2003, American Council on Consumer Interest, Atlanta, GA

October 2002, Academy of Financial Services, San Antonio, TX

April 2002, American Council on Consumer Interests, Universal City, CA

October 2001, Academy of Financial Services, Toronto, Ontario, Canada

August 2001, Program Directors Conference, Board of Standards and Practices, Certified Financial Planners, Westminister, CO

August 2000, Program Directors Conference, Board of Standards and Practices, Certified Financial Planners, Denver, CO.

April 2000, CFP Re-certification

August 1999, Program Directors Conference, Board of Standards and Practices, Certified Financial Planners, Denver, CO.

March 1999, American Council on Consumer Interest, Chicago, IL

"Evaluative Criteria in Budget Allocation Decisions", Department Chair Retreat, Innsbrook, MO, October 1998.

April 1998, CFP Re-certification

October 1997, Personal Finance Employee Education Conference, Roanoke, VA.

1995-96, *Kugler Cases*, Estate Planning Continuing Education Series, ChFC and CLUs of Columbia.

January 1996, Allied Social Science Association Annual Meeting, San Francisco, CA.

July, 1995 American Association of Family and Consumer Science, New Orleans, LA

May, 1995 Wakonse Conference, College Teaching

March, 1995 American Council on Consumer Interests, Minneapolis, MN

November, 1994 Association for Financial Counseling and Planning Education, Nashville, TN

March, 1994 American Council on Consumer Interests, Minneapolis, MN

November, 1993 Association for Financial Counseling and Planning Education, San Antonio, TX

May, 1993 Edward D. Jones Recruitment Workshop, St. Louis, MO

March, 1993 American Council on Consumer Interests, Lexington, KY

October, 1992 Association for Financial Counseling and Planning Education, Charleston, SC

March, 1992 American Council on Consumer Interests, Toronto, Ontario, Canada

November, 1991 NC-184 Regional Meetings, Omaha, NE

October, 1991 Association for Financial Counseling and Planning Education, Kansas City, MO

April, 1991 American Council on Consumer Interest, Cincinnati, OH

September 1990 NC-184 Regional Meeting, Washington, D.C.

October, 1990 Association for Financial Counseling and Planning Education, Columbia, MD

June, 1990 Survey of Income and Program Participation, Inter-university Consortium for Political and Social Research, University of Michigan

March, 1990 American Council on Consumer Interests, New Orleans, LA

October, 1989 Association for Financial Counseling and Planning Education, Ypsilanti, MI

March, 1989 American Council on Consumer Interests, Baltimore, MD

April, 1988 American Council on Consumer Interests, Chicago, IL

January, 1988 Social Sciences in Agricultural Research, Washington, D.C.

April, 1987 Agriculture Experiment Station regional project, "Family Resource Utilization," St. Louis, MO

April, 1987 American Council on Consumer Interests, Denver, CO

April, 1986 American Council on Consumer Interests, St. Louis, MO

## COMMITTEE/ADMINISTRATIVE/PROFESSIONAL ASSIGNMENTS

### A. Professional Assignments

Member. Missouri Jump$tart Coalition, 2004-

Member, Personal Finance Advisory Committee, Missouri Council on Career Education, 2004-

Vice-President Marketing and Public Relations, Academy of Financial Services, 2002-2004

Conference Papers Reviewer, Academy of Financial Services, 2002-

Treasurer, Association for Financial Counseling and Planning Education, 1990 - 1993

Chair, Finance Committee, American Council on Consumer Interests, 1990 - 1993

Member, Editorial Board, Financial Counseling and Planning, 1990-present

Member, Editorial Board, Journal of Consumer Affairs, 1990-98

Member, Editorial Board, Journal of Family and Economic Issues, 1990-98, 2001-present

Editor, Conference Proceedings, Association for Financial Counseling and Planning Education, October 1990.

Chair, Student Awards Committee, Association for Financial Counseling and Planning Education, 1989 - 1990.

Member, Membership Committee, American Council on Consumer Interests, 1989 - 1992.

Reviewer, Home Economics Research Journal, 1985 - present.

Reviewer, Journal of Consumer Affairs, 1986 - 1999.

Conference Proceedings Reviewer, American Council on Consumer Interests, 1987-1995

**B. University of Missouri-Columbia (UMC)**

Chair, Diversity Committee, Department of Athletics, NCAA Self-Study, 2005

Member, Chancellor's Council on Economic Development, UMC, 2005-

Member, Kauffman Entrepreneurial Proposal Task Force, UMC, 2004-

Member, Committee for Effective Resource Allocation, University of Missouri-Columbia, 2000-2003

Observer to the Board of Curators, University of Missouri-Columbia, 1999-2001

Chair, Resource Advisory Council, University of Missouri-Columbia, 1998-2002

Chair, Faculty Council, University of Missouri-Columbia, 1998-1999

Member, Chancellor's Minority Affairs Advisory Committee, 1998-99

UMC-Representative to Inter-campus Faculty Council, 1998-99

Member, Institutional Values Task Force, 1997-98

Member, Chancellor's Strategic Planning Advisory Council, 1997-present

College of Human Environmental Sciences Representative, University of Missouri Faculty Council, 1996-2001

Chair, Student Affairs Committee, University of Missouri Faculty Council, 1997-98

Member, Service Learning Advisory Committee, 1995-2001

Chair, Student Subcommittee, Service Learning Task Force, 1994 - 1995

Member, Service Learning Task Force, 1994 - 1995

Member, Service Learning Task Force, Proposal Committee, 1994 - 1995

Member, Student Conduct Committee, 1992 - 1995

Member, Doctoral Faculty, 1992 - present

Member, Faculty/Staff Employee Benefits Task Force, 1990 - 1993

Senator, Graduate Faculty Senate, 1987 - 1995

Member, Membership Committee, Graduate Faculty Senate, 1991 - 1993

Chair, Academic Affairs Subcommittee, Social Science Sector, Graduate Faculty Senate, 1988 - 1989

Member, General Education Task Force, 1987 - 1989

Secretary, Social Science Sector, Graduate Faculty Senate, 1987 - 1988

Member, Cooperative Extension Rural Crisis Planning Committee, 1984-1987

Missouri University Human Environmental Sciences Extension Advisory Board, 1985 - 1987

Research/Evaluation Sub-Committee of Home-Based Business Committee, Alternatives for the Eighties Committee, 1985 -1986

Co-Chair, Interdisciplinary team to write ES-USDA Farm Crisis Proposal, 1984

**C. College of Human Environmental Sciences Assignments**

Director of Graduate Studies, Department of Consumer and Family Economics, 1994 - 2002.

District Chairperson, Human Environmental Sciences, United Way Campaign, 1993 - 1995.

Member, Promotion and Tenure Committee, 1992 - 1996.

Chair, Graduate Council, 1993 - 1996.

Chair, Faculty Council on College Policy, 1990

Member, Faculty Council on College Policy, 1986 – 1990, 1996-1999

Member, Graduate Council, 1987 - 2002

Member, Undergraduate Curriculum Committee, 1987 - 1989

Member, Academic Status and Appeals Committee, 1986 - 1987.

Member, Student, Faculty, and Alumni Recognition Committee, 1985 - 1986.

**D. Consulting/Public Service**

Salvation Army, Toys for Tots, 2003 –

Boy Scouts of America, Troop 4 Committee, 2003-

Selling Investment Products, State Farm Insurance regional agencies staffs, 2003

$tudent $marts Advisory Board, State of Illinois

$tudent $marts Curriculum Review Board, State of Illinois

Registered Investment Advisor, Sundvold Capital Management, Columbia, MO

Member, Columbia Northwest Rotary, 1998-present

Member, Columbia 2000-II Task Force, Youth and Family Subcommittee, 1993

President, Board of Directors, University YMCA, 1992 - 2000

Member, Advisory Board, Stephen's Elementary Childrens School, 1991 - 1992

Financial Planning for Retirement." Series of eight educational seminars for prospective State Farm Insurance retirees. Summer/Fall 1989, Fall 1990

"Financial Planning for Retirement". Educational seminar for prospective University of Missouri-Rolla retirees, April, 1991-1994.

Treasurer, Board of Directors, UMC Student YMCA/YWCA, 1991- 1992.

Vice-President, Board of Directors, UMC Student YMCA/YWCA, 1988-1989 and 1990-1991.

Member, Board of Directors, UMC Student YMCA/YWCA, 1987 - 2001.

## REFERENCES

Chancellor Emeritus Richard Wallace
105 Jesse Hall
University of Missouri-Columbia
Columbia, MO 65211
(573) 882-3387

Dr. W. Keith Bryant, Chair
Department of Consumer Economics and Housing
Martha Van Rensellear Hall
Cornell University
Ithaca, NY 14853
(607) 255-2238

Dean Robin Douthitt
1300 Linden Drive
146 Human Ecology Building
University of Wisconsin
Madison, WI 53706
(608) 262-4847

## ADDENDUM

## BUSINESS REFERENCES

Mr. John Hagedorn
Vice President and Manager of Sales Training
A.G. Edwards and Sons, Inc.
1 North Jefferson
St. Louis, MO 6310
(314) 955-4191

Ms. Sabrina McDonnell
Senior Vice President
First National Bank and Trust Company
801 E. Broadway
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