

Lu Fan, Ph.D., CFP®

Assistant Professor
Department of Personal Financial Planning
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EDUCATION

University of Georgia Ph.D. in Financial Planning, Housing and Consumer Economics	August 2017
University of Georgia M.A. in Journalism and Mass Communication	May 2012
Capital University of Economics and Business (China) B.A. in Communications	July 2009

ACADEMIC EMPLOYMENT

University of Missouri Assistant Professor, Personal Financial Planning	2017 - Present
University of Georgia Graduate Teaching Assistant, Financial Planning and Consumer Economics	2013 - 2014 2015 - 2017
University of Georgia Graduate Assistant, Extension Office	2014 - 2015
University of Georgia Graduate Tutor, Student Athletic Association Academic Services	2015 - 2017

TEACHING EXPERIENCE

University of Missouri FINPLN 4383/7383 FINPLN 4893/7393 FINPLN 3283	Investment Management Estate and Gift Planning Financial Planning: Computer Application
University of Georgia	<i>(Graduate Instructor)</i>

FHCE 3260	Computer Applications in Financial Planning
FHCE 3000	Family Resource Management
University of Georgia	<i>(Graduate Assistant)</i>
FHCE 3000	Family Resource Management
FHCE 3100	Introductory Consumer Economics
FHCE 3110	Money Skills for Life
FHCE 3150E	Consumer Decision Making (<i>online</i>)
FHCE 3200 / 3200E	Introduction to Personal Finance (<i>online & on-site</i>)
FHCE 4900	Professional Seminar and Internship Orientation
FHCE 5900	Professionalism and Career Readiness
FHCE 5910	Financial Planning, Housing and Consumer Economics Internship
University of Georgia	<i>(Graduate Subject Tutor)</i>
FHCE 2100	Family Economic Issues through the Life Course
FHCE 3150	Consumer Decision Making
FHCE 4000	Consumer Analytics and Research Method
FHCE 4210	Retirement Planning and Employee Benefit
FHCE 4250	Practice Management in Financial Planning

PUBLICATIONS

Refereed Journal Articles

Fan, L., & Chatterjee, S. (*Accepted*). [Financial socialization, financial education, and student loan debt](#). *Journal of Family and Economic Issues*. doi:10.1007/s10834-018-9589-0

Fan, L., & Chatterjee, S. (2018). [Application of situational stimuli for examining the effectiveness of financial education: A behavioral finance perspective](#). *Journal of Behavioral and Experimental Finance*, 17, 68-75.

Chatterjee, S., & **Fan, L.** (2017). [Household demand for private long-term care insurance: An exploratory note](#). *Economics Bulletin*, 37(3), 1975-1981.

Fan, L., & Chatterjee, S. (2017). [Borrowing decisions of households: An examination of the information search process](#), *Journal of Financial Counseling and Planning*, 28(1), 95-106.

Chatterjee, S., **Fan, L.**, Jacobs, B., & Haas, R. (2017). [Risk tolerance and goals-based savings behavior of households: The role of financial literacy](#). *Journal of Personal Finance*, 16(1), 66-77.

Refereed Work in Proceedings

Fan, L., & Chatterjee, S. (2018). [An information search perspective of financial help-seeking behavior.](#) *Consumer Interests Annual.*

Fan, L., & Chatterjee, S. (2017). [An examination of the effectiveness of financial education under situational stimuli: A behavioral finance perspective.](#) *Consumer Interests Annual.*

Fan, L., & Babiarz, P. (2015). [The relationship between financial satisfaction and marital status of U.S. women.](#) *Consumer Interests Annual.*

PRESENTATIONS

Fan, L., Zhang, L., Zhao, H. “Who needs a financial advisor? The roles of investment confidence and knowledge in investors' financial decision-making” To be presented at *2018 Association for Financial Counseling and Planning Education (AFCPE)*, Norfolk, VA.

Fan, L., & Chatterjee, S. “An examination of the influence of robo-advisers, online financial services, and other information sources on investment styles.” To be presented at *2018 Academy of Financial Services (AFS)*, Chicago, IL.

Fan, L., & Zhang, L. “Do sources of financial education affect financial knowledge and financial confidence (Poster).” To be presented at *2018 Academy of Financial Services (AFS)*, Chicago, IL.

Fan, L., & Chatterjee, S. “An information search perspective of financial help-seeking behavior.” Presented at *2018 American Council on Consumer Interests (ACCI)*, Clearwater Beach, FL.

Fan, L., & Chatterjee, S. “The age and gender effects on a conceptual framework of household financial help-seeking behavior.” Presented at *2018 Academic Research Colloquium for Financial Planning*, Arlington, VA.

Fan, L., & Chatterjee, S. “The effect of financial socialization on student loan debt behavior.” Presented at *2017 Financial Therapy Association (FTA)*, San Diego, CA.

Fan, L., & Chatterjee, S. “An examination of the effectiveness of financial education under situational stimuli from a behavioral finance perspective.” Presented at *2017 American Council on Consumer Interests (ACCI)*, Albuquerque, NM. [*NEFE Best Paper Award*].

Fan, L., & Chatterjee, S. “The relationship between personality types, risk tolerance, and portfolio allocation (Poster).” Presented at *2016 Academy of Financial Services (AFS)*, Las Vegas, NV.

Fan, L., & Chatterjee, S. “Personality type and bequest motive among the elderly (Poster).” Presented at *2016 American Council on Consumer Interests (ACCI)*, Washington D.C.

Fan, L., Chatterjee, S., Jacobs, B., & Woodyard, A. “The demand for private long-term care insurance.” Presented at *2015 Association for Financial Counseling and Planning Education (AFCPE)*, Jacksonville, FL.

Fan, L., & Babiarz, P. “The relationship between financial satisfaction and marital status of U.S. women.” Presented at *2015 American Council on Consumer Interests (ACCI)*, Clearwater Beach, FL.

Fan, L., & Chatterjee, S. “Borrowing decisions of households: The role of information search, financial literacy and financial help seeking behavior.” Presented at *2014 Financial Therapy Association (FTA)*, Nashville, TN.

Scott, K.-W., Chung, S., **Fan, L.** “Sugar-sweetened beverages expenditure across the U.S. region.” Presented at *2014 FHCE-UGA Departmental Research Seminar*.

SERVICE

Department-level Service

Doctoral student committee, University of Missouri	2017 - Present
Graduate student advisor, University of Missouri	2017 - Present

College-level Service

Graduate Assistant, UGA Extension Office, Radon Education Program	2014 - 2016
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Professional Service

Reviewer, Family & Consumer Sciences Research Journal	2017 - Present
Reviewer, Journal of Financial Counseling and Planning	2016 - Present
Reviewer, American Council on Consumer Interests	2013 - Present
Student Scholarship Committee, American Council on Consumer Interests	2017 - 2018
Consumer Economics Program Advisory Committee, Athens Technical College	2015 - 2017
VITA, International Tax Assistance Program, University of Georgia	2013 - 2015

FUNDED GRANTS

HES Faculty Grant Writing Institute (\$500) University of Missouri	2018
Summer Doctoral Research Fellowship (\$3,500) University of Georgia Graduate School	2017
Art Caple Scholar Fund (\$5,000) Arthur N. Caple Foundation	2016
Jan M. Hathcote Social Science Academic Support Fund (\$1,800)	2015 - 2016

HONORS AND AWARDS

National Endowment for Financial Education (NEFE) Paper Award American Council on Consumer Interests	2017
Outstanding Teaching Assistant Award University of Georgia	2017
NAGDCA Conference Travel Award Arthur N. Caple Foundation	2016
Virginia Wilbanks Kilgore Scholarship College of Family and Consumer Sciences, UGA	2015 - 2016
Betty Lane Graduate Scholarship College of Family and Consumer Sciences, UGA	2014 - 2015
ACCI Conference Scholarship American Council on Consumer Interests	2015
AFCPE Conference Student Scholarship Association for Financial Counseling and Planning Education	2014

PROFESSIONAL TRAINING

Introduction to the Health and Retirement Study (HRS) Workshop Summer Institute in Survey Research Techniques	2018
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PROFESSIONAL AFFILIATIONS

Certified Financial Planner	2018 - Present
Academy of Financial Services	2018 - Present
American Council on Consumer Interests	2014 - Present
Financial Management Association	2016 - 2017