Message from the Chair - Dr. Fran Lawrence

Welcome back! To our new undergraduate and graduate students, I am pleased to have you join the Personal Financial Planning family. To our returning students, I am delighted to have you back and hope you had a productive summer.

The opening of the school year brings with it many "beginning of the year" activities. This newsletter is one way we will keep you in touch with the PFP activities. College life is busy, and it may seem as though you cannot possibly put any more on your plate. Even so, becoming involved in PFP activities is something that can make your college experience richer and more educational. Let me give a special “shout out” to becoming active in our Financial Planning Association (Mizzou FPA). I look forward to seeing you at the meetings.

Summer Internships

Personal Financial Planning students completed internships around the world during the 2018 summer semester. Yaqi Fang worked with Ping An Bank Company, Ltd., in China (pictured top left). Linsey Winkler worked with Triad Financial Advisors in Greensboro, NC (pictured top right). This company is also home to PFP alumna Lauren Bauer. Grant Fry completed his internship requirement at Bank of America in Seattle, WA (pictured bottom right), while Joy (Yue) Zhuang interned with Greencourt Capital, Inc., in North Bethesda, MD (bottom right). Others worked in cities such as St. Louis, Kansas City, and Miami to name a few. We are proud of our summer interns and the experience they were all able to garner.

Michelle Gregory-Rives Awarded Intern of the Year

Congratulations Michelle Gregory-Rives for being named the Allen/Nevins Intern of the Year for Shelter Insurance Company! According to Brian Jones, Manager of Diversity and Inclusion for Shelter Insurance, some of the factors considered for selecting the recipient of this Award include performance and attendance in internship training, the Pitch Contest completed by the interns, completing assigned tasks in a timely manner, and feedback from supervisors. Jones said of Michelle that she “excelled in all aspects of this summer including being the winner of the Pitch Contest!”
Scholarship Opportunities

The Deena Jo Heide-Diesslin Foundation Challenge Match Scholarship is available through the Center for Financial Planning for those seeking the CFP® certification who demonstrate financial need and are from an underrepresented population within the financial services profession (e.g. race, ethnicity, gender, sexual orientation, and/or disability). The scholarship award for those seeking a Certificate in Personal Financial Planning is $5,000 and is $10,000 for those seeking an undergraduate degree. The deadline is September 14, 2018, and more information is available on the Center for Financial Planning website.

Applications for the 2018 Annette Wells Scholarship from Greater Kansas City Financial Planning Association are now being accepted. Up to 3 scholarship awards are presented each year ranging in amounts of $500 to $1,000. The deadline is November 9, 2018. Application information can be found on the FPAKC website.

Fall Career Fairs

More details and registration information will be announced soon for each of these opportunities.

9/14 Greater Kansas City Financial Planning Association, American Century Investments
4400 Main Street, Kansas City, MO
9/20 College of Business Career Fair
Mizzou Arena, 10:00 a.m. to 3:00 p.m.
9/26 College of Agriculture/Arts & Science Internship Fair
Rollins Gym, Noon to 4:00 p.m.
10/10 Personal Financial Planning Department
Stotler Lounge, 8:00 a.m. to 5:00 p.m.

Welcome Dr. Jim Green, CFP®!

The Personal Financial Planning Department is proud to welcome Dr. Jim Green, CFP®, who began his role this month as Assistant Teaching Professor and Director of the Office for Financial Success. An Air Force veteran, Dr. Green earned his undergraduate degree from the U.S. Air Force Academy, an MBA from Louisiana Tech University, a certificate in financial planning from Florida State University, and a Doctorate of Business Administration from University of the Incarnate Word, San Antonio, TX. Read more about Dr. Green on the news page of our department website.

Professional Development Opportunities

Ellis Library and the Writing Center offer a variety of free professional development opportunities throughout the year. Below are a few that you might find worthwhile as the semester begins. Sessions marked with * are also available online.

Fridays @ the Library
All sessions are 1:00 to 2:00 p.m. in 213 Ellis Library. Registration is required.
8/31 Staying Ahead of the Curve: Be Aware of What Your Library Offers You*
9/7 Introduction to EndNote
9/14 Introduction to Mendeley
9/21 Introduction to Zotero
9/28 Maximizing Your Research Identity and Impact*

Workshops for International Students
All workshops are 3:15 to 4:15 p.m. in 4D11 Ellis Library.
9/10 Exploring the University Libraries
9/11 Introduction to Research
9/12 Plagiarism: What Is It and How to Avoid It?
9/13 Advanced Research
9/14 Zotero
Mizzou Financial Planning Association News

The 2018-2019 Mizzou Financial Planning Association officers have been hard at work this summer planning events for the year. Mizzou FPA meets at 5:00 p.m. on Wednesdays in Gwynn Lounge. The Fall Kick-off meeting is scheduled for August 29. Check social media for the full schedule and updates. Dues are $15 per semester or $25 if paid for the entire year. Dues are collected in cash or through Venmo (@Sam-Wheeland).

2018-2019 Officers
Sam Wheeland, President ........................................ sjw4k3@missouri.edu
John Jackson, Vice President .................................... jsjh7d@missouri.edu
Wendy Severiche, Treasurer ....................................... wcs5v3@missouri.edu
Brandon Easley, Secretary ........................................ bjebe8@missouri.edu
Clayton Foster, Speaker Coordinator .................... clayton.foster@missouri.edu
Ryan Micek, Social Media ........................................ rmmzc6@missouri.edu
Dr. Abed Rabbani, CFP, Faculty Advisor .............. rabbania@missouri.edu

New Doctoral Student Association for HES

The Human Environmental Sciences Doctoral Student Association (HESDSA) was founded in Spring 2018 as an opportunity for all doctoral students in HES disciplines to promote collaboration and the exchange of knowledge, to encourage participation in research and continuing education opportunities, and to provide activities for personal and professional growth and celebrate diversity among our students.

HESDSA officers include President Dalisha Herring, CFP®, Vice President Dawn Van Scoik (Architectural Studies), and Treasurer James Hopfenblatt (Architectural Studies). The faculty advisor for the organization is Dr. Jung Ha-Brookshire, Associate Dean for Research & Graduate Studies.

The group has worked hard to plan meaningful activities for the Fall 2018 semester including 2 research presentation seminars that are an opportunity for PhD students in HES to present an abbreviated research presentation in a non-threatening, peer-led environment to get feedback as fall conferences approach. These seminars will take place at 11:00 a.m., September 28 and October 19, in Gwynn Lounge. Anyone wanting to participate in the seminar should email Dawn Van Scoik (dmhb6b@missouri.edu) for more information. The third major event for the semester is part of a workshop series that will continue in the spring. The fall topic is “Tax & Other Financial Implications for Grad Students,” and this workshop at 11:00 a.m., November 30, in 2206C MU Student Center will be open to all MU graduate students. Lunch will be provided with advanced reservations.

2018-2019 Academic Conferences

Sept. 23-26, 2018 National Association of Government Defined Contribution Administrators (NAGDCA), Philadelphia, PA
Oct. 2-3, 2018 Academy of Financial Services, Chicago, IL
Oct. 3-5, 2018 Financial Planning Association, Chicago, IL
Oct. 25-26, 2018 Financial Planning Career & Education Conference, College Station, TX
Nov. 14-16, 2018 Association for Financial Counseling & Planning Education (AFCPE), Norfolk, VA
Feb. 19-21, 2019 CFP Board Academic Research Colloquium, Arlington, VA

Presentation proposals due Sept. 15, 2018
Doctoral Seminar proposals due Dec. 15, 2018

Feb. 21-22, 2019 CFP Board-Registered Programs Conference, Arlington, VA
May 11-13, 2019 Financial Therapy Association, Austin, TX

Presentation proposals due Jan. 11, 2019

May 13-16, 2019 National Association of Personal Financial Advisors (NAPFA), Austin, TX
May 21-23, 2019 American Council on Consumer Interests, Arlington, VA

Presentation proposals due Oct. 31, 2018