Students & Faculty Attended AFS & FPA Conferences

The Department of Personal Financial Planning was strong in its representation at the Academy for Financial Services (AFS) and Financial Planning Association (FPA) Annual Conferences in Chicago, IL. Those presenting research included Dr. Lu Fan, CFP®, Dr. Abed Rabbani, CFP®, and Doctoral Candidate Zheying Yao. Dr. Fan presented original research, “Do Sources of Financial Education Affect Financial Knowledge and Financial Confidence?” at the AFS Featured Research Session. Dr. Rabbani and Zheying Yao discussed their research, “Risk Tolerance Profile of Cash-Value Life Insurance Owners” (co-authored with doctoral candidate Dalisha Herring, CFP®), at the AFS conference. Dr. Rabbani also presented his research co-authored with Zheying Yao and master’s student Christina Wang, “Association Among Financial Risk Tolerance and the Personality Traits of Sensation-Seeking Locus of Control for Pre-Retiree Baby Boomers,” in one of the AFS breakout sessions. Dr. Fran Lawrence, Professor and Chair, was also in attendance at the AFS conference as a member of the Board of Directors.

The Department’s Larry Fuller Memorial Scholarship helped fund FPA conference travel for 5 students—Yaqi Fang, Clayton Floster, Christina Wang, Sam Wheeland, and Joy Zhuang. These students, along with Dalisha Herring, Zheying Yao, and Weipeng Wu, attended the FPA conference with faculty members, Drs. Lawrence and Rabbani. The week of conferences was filled with opportunities for continuing education, learning from top researchers, and networking with other students, faculty, and financial planning practitioners.
PFP Brings Home Big Scholarship Again and Participates in NAGDCA Retirement Competition

The Department of Personal Financial Planning took a team of 4 students to Philadelphia, PA, in September to compete in the Retirement Knowledge Quiz Bowl at the National Association of Government Defined Contribution Administrators (NAGDCA) Annual Conference. Adam Bogar, Stephen Coy, Cameron Harris, and Linsey Winkler participated in the competition to test their knowledge on retirement planning. What an incredible experience for these students to participate in this national competition (only 6 universities accepted to compete) and to network with industry and government plan sponsor leaders! Team mentors were Assistant Extension Professor Andrew Zumwalt, CFP® and Dr. Fran Lawrence, Professor and Chair.

Graduate Student Professional Development Opportunities

The Office of Graduate Studies (OGS) offers outstanding opportunities for professional development through gradESSENTIALS. Below are the events happening over the next few weeks.

- 10/26 10-11am Tenure-Track or Non-Tenure Track Faculty: Understanding Differences & Opportunities
- 10/30 12-1pm Developing Learning Outcomes: Course Design
- 11/1 10-11am How to Prepare a Job Talk (for the Academic Job Search)
- 11/1 11:15-12:15 Job Talk Showcase
- 11/6 3-4pm All But Dissertation (ABD): Life After Coursework
- 11/7 12-1pm Implicit Bias
- 11/13 11am-Noon Establishing a Mentoring Network
- 11/15 12-1pm CliftonStrengths

Visit the OGS Professional Development website for more information and to register.

Ellis Library and the Writing Center offer a variety of free professional development opportunities throughout the year. Below are upcoming events at the library. 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.
- 11/2 Preserving & Promoting Your Research: Theses/Dissertations in MO space*
- 11/9 Altmetrics: Article Level Metrics for Measuring the Impact of Research*

Digital Media Lab Now Open

Ellis Library’s Digital Media Lab is open for students. This lab in Room 153 provides students with a recording booth, complete with a 3D scanner, art tablets, and virtual reality goggles. Students can also utilize the film studio in the Digital Media Commons (room 3E21). The lab is open 10:00 a.m. to 3:00 p.m. Visit library.missouri.edu/dmc for more information.
Internship Corner

Congratulations to Noah Brinkman, a PFP junior who was accepted to the Leadership Development Program at Northwestern Mutual. He is a leader and constantly strives to hone his skills. He was also selected for the 2018 Summer Camp and Power of 10 programs by the company.

Read more about Noah’s incredible summer internship and honors at http://pfp.missouri.edu/news.html#brinkman.

MU Extension to Offer Continuing Education

MU Extension has partnered with the Missouri Foundation for Health and the Cover Missouri Coalition for the MU Extension Health Insurance Education Initiative. Three MU Extension faculty members are offering continuing education workshops around the state for financial and helping professionals. The training on the Affordable Care Act (ACA) will teach participants how to help clients understand the ACA and how to navigate the marketplace. Training will also include tools to help uninsured clients and employer-sponsored health insurance under the ACA. Workshop presenters include extension faculty Andrew Zumwalt, CFP®, Dr. Graham McCaulley, and Brenda Procter.

Workshops will be held in Olathe, KS (Oct. 30), Lake of the Ozarks (Nov. 5), Kirkwood (Nov. 13), Springfield (Nov. 27), and Cape Girardeau (Dec. 5). More information and online registration for the workshops offering free lunch and 3 continuing education credits for CFP® professionals, Accredited Financial Counselors, and Social Workers can be found at http://pfp.missouri.edu/news.html#ACAtrainings.

Syble Solomon: The Real Issues Causing Financial Stress

The Department of Personal Financial Planning and University of Missouri Extension through the Center for Financial and Economic Education (CFEE) hosted Syble Solomon, creator of Money Habitudes. This counseling instrument teaches financial planners how to better understand their clients' financial tendencies and identify their comfort zones. It is all about talking to clients about the cause of their financial stress.

Andrew Zumwalt, CFP® and Dr. Graham McCaulley, Co-directors of CFEE helped coordinate the all day workshop that also featured Associate Professor Dr. Deanna Sharpe, CFP®, who presented current research on neurofinance. Continuing education credits and lunch were offered to all participants at no cost. This event was the first in a series of events put on by CFEE.

Read more about this event at http://pfp.missouri.edu/news.html#solomon.

Scholarship Opportunities

The Annette Wells Memorial Scholarship for the 2018-2019 academic year is awarded annually by Financial Planning Association of Greater Kansas City. Juniors and seniors enrolled in the undergraduate CFP Board-Registered bachelor’s degree or certificate program are eligible to apply. The application deadline is November 9, 2019. More information is available on the scholarship application found on our website.

The Mid Missouri Estate Planning Council is now accepting applications for its $1,000 scholarship. The scholarship, awarded each January, is in support of the spring semester expenses of the recipient. More information is on the scholarship application on our website. The 2018 scholarship recipient was our own Linsey Winkler. The deadline to apply is December 28, 2018.

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Alumnus Spotlight

Travis Knight, CFP® continues his engagement with the Department of Personal Financial Planning long after his graduation. Travis, Director at BKD Wealth Advisors, LLC, manages approximately $160 million for about 70 families. He says of his experience, “Majoring in financial planning at Mizzou is one of the best decisions I’ve ever made. The nurture and encouragement of the faculty and my department academic advisor was pivotal in helping me launch my career in the profession after graduation.”

Read more about Travis at [http://pfp.missouri.edu/alumni.html#knight](http://pfp.missouri.edu/alumni.html#knight).

Job Postings are Rolling In

The Department is receiving job postings from financial planning firms on a regular basis for full time jobs and internships. Recent postings are from companies such as Vanguard Investor Development Group, Cornerstone Wealth Advisors, Inc., The Trust Company, and HM Capital Management.

Students, be sure to check your emails from Dr. Starla Ivey as she forwards these postings to you all.

Internship Immediate Opening

Charles Parrish is a PFP graduate and owns 13 tax and accounting offices in Missouri and Kansas. He is in search of an intern for his Columbia office for this fall and 3-4 interns for tax season. If you have completed FINPLN 4187 Tax Planning and will be able to work 15-20 hours per week, you may be eligible to apply.

Contact Mr. Parrish at cparrish@hrblock.com for more information.

HES Homecoming Pizza Party a Huge Success

The College of Human Environmental Sciences welcomed students, faculty, staff, and alumni for its annual homecoming pizza party on Friday, October 19, 2018. Personal Financial Planning students, staff, faculty, family, and friends pictured below enjoyed pizza, cookies, and fellowship while kicking off the homecoming weekend festivities with crisp, autumn temperatures.
FINPLN 4188 Required Training

All students planning to take FINPLN 4188: Community Agencies & Volunteerism in the Spring 2019 semester MUST complete the pre-semester training on campus, January 16-18, 2019. This is BEFORE the semester begins. The training will be held 8:30 a.m. to 4:30 p.m. each day. This training is required for students in the 4188 class to become IRS certified as IRS certification is no longer granted in FINPLN 4187: Tax Planning. Students enrolled in 4188 for the spring semester who do not complete the training will be dropped from the course on the first day of the spring semester.

Mizzou Financial Planning Association News

Don’t miss the opportunity to network and learn from industry professionals through involvement with Mizzou Financial Planning Association! Check social media for the full schedule and updates. All meetings are at 5pm in 117 Gwynn Hall (Gwynn Lounge) unless otherwise stated.

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
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Dr. Abed Rabbani, CFP, Faculty Advisor.......rabbania@missouri.edu

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Upcoming Events
November 5, 2018
Commerce Trust Company

November 7, 2018
Krilogy

November 28, 2018
Mariner Wealth Advisors

2018-2019 Academic Conference Schedule

Nov. 14-16, 2018  Association for Financial Counseling & Planning Education (AFCP), Norfolk, VA
Feb. 19-21, 2019  CFP Board Academic Research Colloquium, Arlington, VA
   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
June 12-14, 2019  Financial Management Association European Conference, Glasgow, Scotland
   Presentation proposals due Dec. 3, 2018

Professional Photo Needed

Do you have a professional photo of yourself? Don’t miss the last MU Career Center LinkedIn Photo Day of the semester. It is Friday, November 2, so mark your calendar now for this free photo opportunity. Be sure to dress in your best business professional attire.

Sample photo ▶