One Day to Make a Difference

Mizzou Giving Day started today! This 24-hour event raises support for the entire Tiger family and lasts from noon, March 13, to noon, March 14, 2019. Mizzou Giving Day is an exciting initiative inspiring support for what we love most about Mizzou. Let’s come together and show how Tigers can make a difference!

Show your support by making a gift to the Department of Personal Financial Planning or to the Office for Financial Success. Visit givingday.missouri.edu to make your contribution. Find our Unit, College of Human Environmental Sciences, and our Fund names, PFP-Personal Financial Planning Excellence Fund and PFP-Office for Financial Success. Share your story on social media and tag with #MizzouGivingDay, #mizzoupfp, and #MUOFS.

Personal Financial Planning Student Tapped for Mizzou 18

Master’s degree student Christina Wang was one of 18 University of Missouri graduate and professional students tapped for the 2019 class of Mizzou 18. This distinguished honor is bestowed upon those who demonstrate world-class research, collaboration with faculty and staff, and leadership. Each honored student also chooses a faculty or staff member to be recognized for their impact on lives of MU students. Christina selected Associate Professor and Director of Graduate Studies Rui Yao, PhD, CFP®.

Read more about Christina and this prestigious honor at pfp.missouri.edu/news.html#wang.
Students Participate in National Conference

Seniors Brandon Easley and Linsey Winkler were selected to participate in the 2019 TD Ameritrade LINC National Conference in San Diego, CA. Throughout the week, they met with top students from various colleges across the country to discuss Nextgen Personal Financial Planning. The goal of the conference was to introduce the next generation of financial planners to the industry by sharing stories and knowledge, and by providing insight to overcoming challenges they may face along the way. The conference provided many opportunities for students and advisors across the nation to network and share ideas. Advisors and students were introduced to new technology geared toward improvement of the client experience.

Linsey Winkler said, “Attending the 2019 TD Ameritrade National LINC Conference has helped me gain valuable knowledge about the financial planning industry. Overall it was the experience of a lifetime, and I am extremely honored to have represented the Department of Personal Financial Planning at the University of Missouri alongside Brandon Easley.”

Volunteer Income Tax Assistance (VITA) in Full Swing

Assistant Extension Professor Andrew Zumwalt M.S, CFP® has been instrumental in growing the Missouri Taxpayer Education Initiative (MOTax). Last year, VITA sites served more than 10,000 Missouri families with approximately 20% of these returns prepared on the MU campus by students in Mr. Zumwalt’s Community Agencies and Volunteerism class. He is active across Missouri providing training for the IRS VITA sites and financial planning education for Extension personnel. He has formed a relationship between MU Extension and the Justice Advocate General Corp providing tax preparation assistance for thousands of soldiers and gold star families.
The Graduate School’s gradESSENTIALS program provides professional development opportunities for all MU graduate students. Below are the events happening over the next several weeks. Check out gradschool.missouri.edu/grad-essentials for more information and to register.

3/15  10am-Noon   Storytelling Workshop
3/19  Noon-1pm    Using Pivot to Find Grants
3/20  Noon–1pm    Exploring the Alt-Ac Job Search
3/21  12pm-1:30pm ESL Writing Workshop: Revision
3/22  9am-Noon    Pre-Spring Break Writing Retreat
4/5   9am-3pm     Graduate & Postdoc Writing Retreat
4/14  6:30-9:30pm JCPenney Suit-Up Event for ALL students - Grad & Undergrad!
                 Extra 40% off professional attire. Register here for the Suit-Up Event.

CFP Board Online Career Fair & Mentor Program

The CFP Board is hosting an online career fair Thursday, April 4. Connect with leading financial planning firms who are seeking to fill internships and full-time positions.

Update your online profile and resume and explore job postings on the CFP Board Career Center website.

The CFP Board also offers its Mentor Program for anyone on the path to the CFP® to connect with an established CFP® Professional. Enroll today on the CFP Board website!

Faculty Research Corner

PFP faculty are consistently publishing research with three faculty publishing works in late 2018. Director of Graduate Studies and Associate Professor Rui Yao, PhD, CFP® published her work, “Credit Card Usage Among College Students in China” in the Journal of Financial Counseling and Planning with a colleague at Central University of Finance and Economics in Beijing, China.

Assistant Professor Abed Rabbani, PhD, CFP® and Professor and Chair Fran Lawrence, PhD, published “The Investment Risk Tolerance Assessment: A Resource for Extension Educators” in the Journal of Extension with co-authors from Rutgers University and the University of Georgia.

Read more on our website.

Dr. Fran C. Lawrence
Dr. Abed Rabbani, CFP®
Dr. Rui Yao, CFP®
Faculty & Students Present Innovative Research

Eight faculty and students traveled to Arlington, VA, to participate in the 2019 CFP Board Academic Research Colloquium for Financial Planning and Related Disciplines (ARC). Some remained for the CFP Board Registered Programs Conference that followed.

Dalisha Herring, CFP®, was one of only five doctoral candidates invited to share a brief job-talk presentation at the Doctoral Seminar Pre-Conference for the ARC.

Other participants presenting research at the conference included Assistant Professors Dr. Lu Fan, CFP® and Dr. Abed Rabbani, CFP®, Associate Professor Dr. Rui Yao, CFP®, doctoral candidate Xihao Huang, doctoral student Weipeng Wu, and master’s student Christina Wang. Dr. Fran Lawrence, Professor, Chair, and CFP Board Registered Program Director, served on the steering committee for the conference and on the doctoral seminar panel.

While the ARC group braved winter elements, Extension Professor Cynthia Crawford, PhD, was a featured presenter during the Family Economics and Resource Management Association’s inaugural virtual conference from the comfort of her office. Read more about Dr. Crawford’s experience at http://pfp.missouri.edu/news.html#FERMA.

Making Tracks

Recent and upcoming Personal Financial Planning graduates are making tracks as they make their mark on the financial planning industry!

Sean Burke and Riley Larkin are interning this semester with Northwestern Mutual.

Stephen Coy accepted a position with Thrivent Financial as an Associate in the St. Louis office.

Brandon Easley accepted a position as Financial Advisor in the St. Louis office of Renaissance Financial.

Clayton Foster will be interning this summer with AXA Advisors in its Retirement Benefits Group in Oakland Park, KS.

Elizaveta Korshunova is completing her internship requirement as Student Manager of the Office for Financial Success.

Wendy Severiche will commission into the United States Army on May 19, 2019, as a Field Artillery 2nd Lieutenant.

Ethan Wallace currently serves as an intern with Wilkerson & Reynolds Wealth Management in Columbia. He recently completed the next step in moving his career forward by passing the Securities Industry Essentials™ Exam.

What are your accomplishments that we can share? Email your great news to Dr. Fran Lawrence at lawrencef@missouri.edu.

Student Spotlight

Cameron Harris, a senior Personal Financial Planning student from the south suburbs of Chicago, is our latest Student Spotlight. A leader on campus and in the community, Mr. Harris strives for excellence and believes in giving back. He interned with TRB & Associates in Fall 2018 and has been continuously employed since his freshman year with MU Campus Dining Services. He was awarded the 2018 Student Employee Scholarship. Mr. Harris is involved with MOCHA (Men of Color, Honor and Ambition), the Mizzou Financial Planning Association, and he is a past volunteer tax preparer with the Volunteer Income Tax Assistance (VITA) program.

Read more about Cameron at http://pfp.missouri.edu/students.html.
**Alumnus Spotlight**

**Jim Gerlock** earned his BS in Personal Financial Planning in 2014 then began his career in Texas. Mr. Gerlock joined the Addison Group three years ago in Chicago where he served as a Senior Consultant opening offices in Houston and Chicago. He values the importance of community service and was elected to the St. Jude Young Professionals Board of Chicago. He advises current students “to utilize the counseling given in all areas of the program to make the transition to the real world the most seamless possible.”

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

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**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**

- Sam Wheeland, President sjw4k3@missouri.edu
- John Jackson, Vice President jsjh7d@missouri.edu
- Wendy Severiche, Treasurer wcs5v3@missouri.edu
- Brandon Easley, Secretary bjebc8@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

**Upcoming Events**

- **March 13**
  American Century Investments
- **April 10**
  Vine Wealth Management

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**Academic Conference Schedule**

<table>
<thead>
<tr>
<th>Date</th>
<th>Event details</th>
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<tbody>
<tr>
<td>Mar. 20-22, 2019</td>
<td>International Association of Registered Financial Consultants, Nashville, TN</td>
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<tr>
<td>May 11-13, 2019</td>
<td>Financial Therapy Association, Austin, TX</td>
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<tr>
<td>May 13-16, 2019</td>
<td>National Association of Personal Financial Advisors (NAPFA), Austin, TX</td>
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<td>May 21-23, 2019</td>
<td>American Council on Consumer Interests, Arlington, VA</td>
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<td>July 10-12, 2019</td>
<td>Financial Management Association, Asia/Pacific Conference, Ho Chi Minh City, Vietnam</td>
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<td>Oct. 15-16, 2019</td>
<td>Academy of Financial Services, Minneapolis, MN</td>
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<td><strong>Call for Proposals deadline April 15, 2019</strong></td>
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<tr>
<td>Oct. 16-18, 2019</td>
<td>Financial Planning Association Annual Conference, Minneapolis, MN</td>
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<td><strong>Doctoral Consortium application deadline May 3, 2019</strong></td>
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<tr>
<td>Nov. 19-21, 2019</td>
<td>Association of Financial Counseling and Planning Education, Portland, OR</td>
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