Top Showing at CFP Board Academic Research Colloquium

The Department of Personal Financial Planning faculty and graduate students made a strong showing at the CFP Board Academic Research Colloquium for Financial Planning and Related Disciplines (Colloquium). The department had the largest research impact based on two of the three metrics used to assess the 2019 Colloquium according to "Financial Planning Research Highlights from the 2019 CFP Board Academic Research Colloquium" by Kitces.com. The Colloquium is held annually in Arlington, Virginia, by the CFP Board’s Center for Financial Planning. It is a premier opportunity for members of the financial planning profession to exhibit and discuss cutting-edge research and the implications on the financial planning field.

Those attending the Colloquium from MU included faculty Dr. Fran Lawrence, Dr. Rui Yao, CFP®, Dr. Lu Fan, CFP®, and Dr. Abed Rabbani, CFP®, as well as graduate students Dalisha Herring, CFP®, Xihao Huang, Christina Wang, and Weipeng Wu.

Read more at pfp.missouri.edu/news.html#Colloquium.

Herring Recognized for Excellent Student Leadership

Doctoral Candidate Dalisha D. Herring, CFP® was recognized for her outstanding service to the Mizzou graduate community at the Graduate & Postdoctoral Awards Banquet. She received the Excellence in Student Leadership Award from the Graduate and Professional Council as a testament to her faithful service to graduate and professional students during her time at MU. She is involved in leadership roles across the Mizzou and Columbia communities. Read more at http://pfp.missouri.edu/news.html#Herring.

Camp Opportunity for High School Students

The MU Department of Personal Financial Planning is hosting its inaugural Financial Planning Academy this summer. Funded by Charles Schwab Foundation, this camp is designed to help high school students deepen their understanding of personal finance and the profession of financial planning.

Students will learn from financial planning experts while gaining such skills as leadership, team-building, marketing, communication, and entrepreneurship.

Visit financialplanningacademy.hs.ttu.edu for more information and the application to participate. Questions should be directed to pfp.fpacademy@missouri.edu.

MU Partnership in Missouri Personal Finance Challenge

The Department of Personal Financial Planning (PFP), through its Center for Economic and Financial Education, recently hosted the Missouri Personal Financial Challenge, a statewide competition for high school students to test their personal finance knowledge. More than 300 teams competed in the first round via an online competition, and the top 8 teams were invited to campus to complete in the final challenge. Judges for the campus challenge included PFP faculty, students, alumni, and friends. Congratulations to this year’s winning teams—Hannibal Career & Technical Center (1st place) and Lutheran North, St. Louis (2nd place).

Read more at http://pfp.missouri.edu/news.html#challenge.
Internship Student Spotlight

Ethan Wallace, a senior in the Department of Personal Financial Planning, fulfilled his internship requirement with Wilkerson & Reynolds Wealth Management in Columbia. Wallace enjoyed the opportunity to learn from firm owners Carroll Wilkerson, CFP®, and Jared Reynolds, CFP®, CDFA™, CPFA, while engaging in hands-on learning opportunities that enhanced his knowledge of investment management and retirement planning.

Read more about his experience at http://pfp.missouri.edu/careers.html#internships

New Course Alert! Securities Industry Essentials Course

Open to any Mizzou undergraduate or graduate student from any academic discipline, the Department of Personal Financial Planning is excited to announce FINPLN 4418/7001: Topics in Personal Financial Planning. This 1-credit hour course will prepare students to sit for the FINRA Securities Industry Essentials (SIE) exam, the first in the series of licensing exams in the financial services industry.

The course will be taught by Assistant Teaching Professor and Director of the department’s Office for Financial Success Jim Green, DBA, CFP®, AFC® this fall on Mondays, 10:00 to 10:50 a.m.

For more information, contact Dr. Green via email at jimgreen@missouri.edu.

Another Successful Year of Volunteer Income Tax Assistance

The Volunteer Income Tax Assistance (VITA) program has a long history of operation through University of Missouri Extension on campus and at the Family Impact Center (FIC) off campus in the Columbia community. Approximately 1,500 federal income tax returns were filed across sites, including the Department of Personal Financial Planning’s Office for Financial Success and the FIC this year. The VITA program expanded operation to the FIC seven years ago to further community outreach opportunities and create long-lasting impressions in the Columbia community. VITA serves Missouri families across the state with many of these returns prepared on the MU campus by students in the Department of Financial Planning’s Community Agencies and Volunteerism course taught by Andrew Zumwalt, CFP®.

VITA lab volunteers with Andrew Zumwalt, CFP®
Continuing Education Offered Through Center for Economic and Financial Education

The Center for Economic and Financial Education, affiliated with the Missouri Council on Economic Education, is housed in the Department of Personal Financial Planning. Co-Directors Dr. Graham McCaulley and Andrew Zumwalt, CFP®, along with Personal Financial Planning Educator Marco Pantoja, AFC®, are creators and presenters of “Student Loans: From Start to Finish,” a workshop currently being presented across Missouri. The workshop is open to the public and available at no cost, offering 3 hours of continuing education for the CFP Board and AFCPE® as well as .3 CEUs through the MU School of Social Work.

Upcoming workshops will be held 10:30 a.m. to 2:30 p.m. in Kansas City (May 21), Springfield (May 23), and Jackson (May 30). Advanced registration is required; lunch will be provided. More information and the link for registration is available at: http://pfp.missouri.edu/news.html#loans.

Dalisha Herring, CFP® and Christina Wang Present at Annual Research Forum

The 36th Annual Research and Creative Activities Forum, a program of the MU Graduate and Professional Students, was held April 3-5 in Mizzou’s Jesse Hall. Dalisha Herring, CFP® and Christina Wang were accepted to present their empirical research projects at the Forum.

Herring won third place in the Social Sciences (Qualitative) category for her research presentation on “Effect of Military Service on Generation X Retirement Income Expectations in the Post-Great Recession Economy.” Wang presented her research titled “Does Personality Predict Financial Risk Tolerance of Pre-Retiree Baby Boomers?”

Both Herring and Wang will be further refining these projects with their co-authors to present on an international stage at the upcoming American Council on Consumer Interests annual conference in Arlington, Virginia. Read more at http://pfp.missouri.edu/news.html#MUresearch.

Mizzou Financial Planning Association Hosts Northwestern Mutual

Gerard Hempstead, CASL, CFP®, ChFC, CLU, Mike Mouser, and Taylore Johnson of Northwestern Mutual spoke with students of Mizzou Financial Planning Association. Upon the students’ completion of the company’s Culture Index questionnaire, Hempstead, Mouser, and Johnson analyzed the students’ responses to provide them with insight into their work-related and behavioral characteristics.
Annette Wells Memorial Scholarship

Senior Linsey Winkler was awarded the 2019 Annette Wells Memorial Scholarship award by the Financial Planning Association of Greater Kansas City. The award was presented at the March FPA meeting by its president, George Fernandez, CFP®.

Upon graduation in May, Winkler will begin her career in Dallas, Texas, with RGT Wealth Advisors, a fee-only firm.

Alumna Spotlight

Lacey Mitchell is a 2010 graduate of the University of Missouri where she earned her Bachelor of Science in Personal Financial Planning. While on the Mizzou campus, Mitchell served as Student Manager for the Office for Financial Success (OFS), a role in which she supervised student financial counselors providing no-cost financial counseling to the Mizzou and Columbia communities. Upon graduation, she served the Department of Personal Financial Planning as a member of its Board of Advisors.

Mitchell launched her career with State Farm by opening her growing practice in the Central West End in St. Louis. Read more on our website at http://pfp.missouri.edu/alumni.html.

Student Spotlight

Aaron Witherspoon, a junior in the Department of Personal Financial Planning, bought his first share of stock at the age of 16 and has been increasing his financial knowledge ever since.

Witherspoon has accepted a summer internship with Commerce Bank in its Trust Department where he will work with the portfolio management team.

An active member of the Mizzou community, Witherspoon is a member of Black Men’s Initiative, Alumni Association Student Board, United Ambassadors, and Alpha Phi Alpha Fraternity, Inc.

Read more about Witherspoon’s journey at http://pfp.missouri.edu/news.html#witherspoon.

OFS Awarded Student Fee Capital Improvement Grant

Mizzou’s Student Fee Capital Improvement Committee (SFCIC) presented a $10,200 grant to the Office for Financial Success (OFS) to fund needs to improve accessibility and efficiency. The OFS is the Department’s money management center dedicated to improving lives of the Mizzou and greater Columbia communities. Under the direction of Green and the center’s Student Manager, Elizaveta Korshunova, the OFS staff and volunteers provide one-on-one counseling sessions and financial workshops to groups across the Mizzou campus. Green and Korshunova are pictured at right with Xihao Huang, graduate student assistant and other OFS volunteers.

Read more about the SFCIC grant funding at http://pfp.missouri.edu/news.html#OFS.

Dr. Lu Fan Awarded Grant

Assistant Professor Lu Fan, Ph.D., CFP®, was awarded one of five $3,000 grants by the Margaret W. Mangel Faculty Research Catalyst Fund for her project "Antecedents of Financial Information Processing of Young Adults." The primary goal of the grant is to inspire new research initiatives that will grow into larger projects capable of being supported from sources external from the College.
## Academic Conference Schedule

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<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>May 11-13, 2019</td>
<td>Financial Therapy Association</td>
<td>Austin, TX</td>
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<tr>
<td>May 13-16, 2019</td>
<td>National Association of Personal Financial Advisors (NAPFA)</td>
<td>Austin, TX</td>
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<tr>
<td>May 21-23, 2019</td>
<td>American Council on Consumer Interests</td>
<td>Arlington, VA</td>
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<tr>
<td>July 14-16, 2019</td>
<td>Higher Education Financial Wellness Summit</td>
<td>Bloomington, IN</td>
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<tr>
<td>Oct. 15-16, 2019</td>
<td>Academy of Financial Services</td>
<td>Minneapolis, MN</td>
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<tr>
<td>Oct. 16-18, 2019</td>
<td>Financial Planning Association Annual Conference</td>
<td>Minneapolis, MN</td>
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**Call for Proposals deadline May 15, 2019**

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<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tr>
<td>Nov. 19-21, 2019</td>
<td>Association of Financial Counseling and Planning Education</td>
<td>Portland, OR</td>
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**Call for Proposals deadline June 3, 2019**

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## Congratulations Graduates!

We are excited to celebrate with our Class of 2019 at the Hearnes Center on Saturday, May 18, at 12:30 p.m.

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## Share Your Story!

*Students*, have you accepted an internship or a job? *Alumni*, have you passed the CFP® examination or made a career move? We want to know your news and share in your joy! Let us know your news so we can share it with our PFP family. Email Dr. Fran Lawrence at lawrencef@missouri.edu.