

Tom C. Nelson, PhD, CFP®

Objective	Teaching and mentoring students of finance, particularly in corporate finance, financial planning, and investment/portfolio management.
Teaching Experience	<ul style="list-style-type: none"> • 1999 to present Leeds School of Business, University of Colorado Boulder, CO Associate Teaching Professor of Finance Senior Instructor of Finance Teach Introduction to Finance, Investments and Portfolio Management, and Applied Business Finance (senior case course) at both undergrad and graduate level • 1999 - 2010 Metro State College, Univ of Phoenix Denver, CO Instructor Teach the Investments course of the CFP® certification program.
Work Experience	<ul style="list-style-type: none"> • 1995-present Financial Planning Broomfield, CO Personal Financial Consultant (2008-present) Financial planning and consulting to private clients. Trustee, Wood Trusts (1995-present) Financial planning, asset management, and trust management for four private trusts with \$5 million under management • 1993-1999 American Medical Response Denver, CO Group VP of Financial Operations (1997-1999) Chief financial director for 7 divisions in 15 states, \$250 million revenue, 4,000 employees, overseeing financial operations and budget; consolidated financial functions over 12 month period. Group Chief Financial Officer (1993-1997) Chief financial executive for \$75 million region; Integrated financial functions and conducted acquisitions during tenure. • 1983-1993 A-1 Ambulance Companies Boulder, CO General Manager and General Partner (1983-1993) Executive responsibility for 5 closely held paramedic ambulance companies in Colorado, Wyoming, and New Mexico, 150 employees and \$10 million revenues

Tom C. Nelson, PhD, CFP®

January, 2022

Education	<ul style="list-style-type: none">• 1989 University of Colorado Boulder, CO PhD, Business Administration/Finance Minor in Information/DataBase Science• 1987 College for Financial Planning Denver, CO CFP® (Certified Financial Planner™) designation• 1983 University of Colorado Boulder, CO MBA, Business Administration/Finance Member: Beta Gamma Sigma• 1981 University of Colorado Boulder, CO BA, Psychology
Honors and Memberships	<ul style="list-style-type: none">• Honors Annual Honoree, Bridge House Homeless Community Center, 2013 Finalist, Frasca Teaching Award, Leeds Business School, 2012, 2013 Tissone Award for Teaching Innovation and Dedication, Leeds Business School, 2007 Outstanding Leadership Award, American Medical Response, 1995• Memberships Financial Management Association Financial Education Association Financial Planning Association
University Courses Taught	<ul style="list-style-type: none">• Introduction to Finance (undergraduate)• Corporate Finance (undergraduate)• Principles of Finance (graduate and executive MBA)• Investments and Portfolio Management (undergraduate and graduate)• Applied Financial Management-Case Course (undergraduate and graduate)• Senior Seminar in Finance (undergraduate)• CU Business Intensive Certificate Program (CUBIC)• Executive Education programs (graduate)• Investment Planning (CFP Certification Course)
References	Available upon Request

Teaching History (1999-2022)
Tom C. Nelson, PhD

Leeds School of Business
University of Colorado, Boulder

Date	Course	Description
Fall 1999	Corporate Finance 3010	Undergrad Finance, 2 sections, 75 students
Spring 2000	Applied Corporate Finance 4020	Undergrad Case Course, 3 sections, 135 students
Fall 2000	Corporate Finance 3010	Undergrad Finance, 2 sections, 81 students
Spring 2001	Applied Corporate Finance 4020	Undergrad Case Course, 3 sections, 125 students
Fall 2001	Corporate Finance 3010	Undergrad Finance, 2 sections, 76 students
Fall 2001	Investments/Portfolio Mgmt 4030	Undergrad Investments, 55 students
Spring 2002	Applied Corporate Finance 4020	Undergrad Case Course, 3 sections, 135 students
Fall 2002	Corporate Finance 3010	Undergrad Finance, 2 sections, 72 students
Fall 2002	Investments/Portfolio Mgmt 4030	Undergrad Investments, 2 sections, 82 students
Spring 2003	Applied Corporate Finance 4020	Undergrad Case Course, 3 sections, 120 students
Fall 2003	BCOR 2100 Introduction to Finance	Undergrad Intro, 1 section, 350 students
Fall 2003	Applied Financial Management MBAX 6210	Graduate Case Course, 2 sections, 37 students
Spring 2004	Applied Financial Management MBAX 6210	Graduate Case Course, 1 section, 25 students
Spring 2004	Applied Corporate Finance FNCE 4020	Undergrad Case Course, 3 sections, 145 students
Fall 2004	Applied Financial Management MBAX 6210	Graduate Case Course, 1 section, 32 students
Fall 2004	BCOR 2100 Introduction to Finance	Undergrad Intro, 1 section, 425 students
Spring 2005	Applied Corporate Finance FNCE 4020	Undergrad Case Course, 4 sections, 155 students
Spring 2005	Investments/Portfolio Mgmt 4030	Undergrad Investments, 1 section, 42 students
Fall 2005	BCOR 2100 Introduction to Finance	Undergrad Intro, 1 section, 425 students
Fall 2005	Investments/Portfolio Mgmt 4030	Undergrad Investments, 2 sections, 102 students
Spring 2006	Applied Corporate Finance FNCE 4020	Undergrad Case Course, 4 sections, 172 students
Summer 2006	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 125 students
Fall 2006	Investments/Portfolio Mgmt 4030	Undergrad Investments, 2 sections, 86 students
Fall 2006	Investment Mgmt and Analysis MBAX 6220	Graduate Investments, 22 students
Fall 2006	BCOR 2200 Introduction to Finance	Undergrad Intro, 1 section, 275 students
Spring 2007	Applied Corporate Finance FNCE 4020	Undergrad Case Course, 3 sections, 127 students
Spring 2007	Executive Education-Finance	Korean Electric Power Group, 35 students
Summer 2007	Executive Education-Finance	Bank of Indonesia, 28 students
Fall 2007	Investment Mgmt and Analysis MBAX 6220	Graduate Investments, 41 students
Fall 2007	Investments/Portfolio Mgmt 4030	Undergrad Investments, 2 sections 105 students
Spring 2008	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 600 students
Summer 2008	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 125 students
Fall 2008	BCOR 4002 Senior Seminar in Finance	Undergrad Capstone, 2 sections, 40 students
Spring 2009	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 500 students
Summer 2009	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 125 students
Fall 2009	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 2 sections, 40 students
Fall 2009	Investment Mgmt and Analysis MBAX 6220	Graduate Investments , 43 students
Maymester 2010	CUBIC—Business Intensive Certificate	Non-business majors and graduates 50 students
Summer 2010	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 125 students
Fall 2010	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 2 sections, 60 students
Fall 2010	Executive Education at Digital Globe Inc	Exec Ed in finance to 25 senior executives
Spring 2011	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 325 students
Maymester 2011	CUBIC—Business Intensive Certificate	Non-business majors and graduates 50 students
Summer 2010	Executive Education at Digital Globe Inc	Exec Ed in finance to 24 senior executives
Summer 2011	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 125 students
Fall 2011	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 2 sections, 60 students
Fall 2011	MBAX 6221 Investments	Graduate investments, 37 students

Leeds School of Business
University of Colorado, Boulder

Date	Course	Description
Spring 2012	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 325 students
Maymester 2012	CUBIC—Business Intensive Certificate	Non-business majors and graduates, 50 students
June 2012	CUBIC—Business Intensive Certificate	Non-business majors and graduates, 25 students
Summer 2012	BCOR 2200 Introduction to Finance	Undergrad Intro, 2 sections, 110 students
Fall 2012	BCOR 2200 Introduction to Finance	Undergrad Intro, 1 section, 175 students
Spring 2013	BCOR 2200 Introduction to Finance	Undergrad Intro, 1 section, 185 students
Spring 2013	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 2 sections, 90 students
Maymester 2013	CUBIC—Business Intensive Certificate	Non-business majors and graduates, 50 students
Spring 2013	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 2 sections, 90 students
Fall 2013	BCOR 2200 Introduction to Finance	Undergrad Intro, 1 section, 225 students
Fall 2013	FNCE 3010 Corporate Finance	Undergrad Finance, 1 section, 47 students
Maymester 2014	CUBIC—Business Intensive Certificate	Non-business majors and graduates, 38 students
Spring 2014	BCOR 2200 Introduction to Finance	Undergrad Intro, 1 section, 215 students
Spring 2014	BUSM 2002 Accounting/Finance	Business Minor course, 1 section, 216 students
Fall 2014	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 2 sections, 60 students
Fall 2014	BUSM 3002 Analytics for Business Minors	Business Minor course, 1 section, 60 students
Fall 2014	BUSM 2002 Accounting/Finance	Business Minor course, 1 section, 156 students
Spring 2015	BUSM 3002 Analytics for Business Minors	Business Minor course, 1 section, 48 students
Spring 2015	BUSM 2002 Accounting/Finance	Business Minor course, 1 section, 160 students
Maymester 2015	CUBIC—Business Intensive Certificate	Non-business majors and graduates, 49 students
Fall 2015	BUSM 3002 Analytics for Business Minors	Business Minor course, 1 section, 73 students
Fall 2015	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 2 section, 90 students
Spring 2016	BUSM 3002 Analytics for Business Minors	Business Minor course, 2 sections, 57 students
Spring 2016	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 2 sections, 98 students
Maymester 2016	CUBIC—Business Intensive Certificate	Non-business majors and graduates, 49 students
Fall, 2016	BUSM 3002 Analytics for Business Minors	Business Minor course, 2 sections, 84 students
Fall, 2016	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 2 sections, 91 students
Spring 2017	BUSM 3002 Analytics for Business Minors	Business Minor course, 2 sections, 35 students
Spring 2017	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 3 sections, 139 students
Maymester 2017	CUBIC—Business Intensive Certificate	Non-business majors and graduates, 50 students
Fall, 2017	FNCE 3040—Insurance and Retirement	Undergrad, 35 students
Fall, 2017	BASE 2101, 02, 03, 04 Sophomore Experience	BASE program 248 students
Spring 2018	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 3 sections, 147 students
Fall, 2017	BASE 2101, 02, 03, 04 Sophomore Experience	BASE program 252 students
Fall, 2018	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 1 section, 40 students
Spring, 2019	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 3 sections, 143 students
Summer, 2019	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 1 section, 9 students
Summer, 2019	FNCE 3010 Corporate Finance	Undergrad Finance, 1 section, 9 students
Summer, 2019	BCOR 2204 Fundamentals of Finance	Undergrad Finance, 1 section, 19 students
Summer, 2019	BUSM 2021 Finance for Bus Minors	Business Minor course, 2 sections, 77 students
Summer, 2020	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 1 section, 25 students
Summer, 2020	FNCE 3010 Corporate Finance	Undergrad Finance, 1 section, 24 students
Summer, 2020	BCOR 2204 Fundamentals of Finance	Undergrad Finance, 1 section, 50 students
Summer, 2020	BUSM 2021 Finance for Bus Minors	Business Minor course, 1 section, 150 students
Summer, 2021	FNCE 4850 Senior Seminar in Finance	Undergrad Capstone, 1 section, 21 students
Summer, 2021	FNCE 3010 Corporate Finance	Undergrad Finance, 1 section, 23 students
Summer, 2021	BCOR 2204 Fundamentals of Finance	Undergrad Finance, 1 section, 41 students
Summer, 2021	BUSM 2021 Finance for Bus Minors	Business Minor course, 1 section, 97 students

Executive MBA Program Teaching History (1999-2019)
Tom C. Nelson, PhD

University of Colorado

Date	Course	Description
Spring 2012	XBUS 6420 Managerial Finance	Executive MBA, 1 section, 35 students
Spring 2013	XBUS 6420 Managerial Finance	Executive MBA, 1 section, 32 students
Spring 2014	XBUS 6420 Managerial Finance	Executive MBA, 1 section, 18 students
Summer 2014	Financial Valuation and Strategy Seminar	Executive MBA seminar, 20 students
Spring 2015	XBUS 6420 Managerial Finance	Executive MBA, 1 section, 27 students
Winter 2016	XBUS 6420 Managerial Finance	Executive MBA, 1 section, 32 students
Winter 2017	XBUS 6420 Managerial Finance	Executive MBA, 1 section, 29 students
Winter 2018	XBUS 6420 Managerial Finance	Executive MBA, 1 section, 25 students
Winter 2019	XBUS 6420 Managerial Finance	Executive MBA, 1 section, 22 students
Winter 2020	XBUS 6420 Managerial Finance	Executive MBA, 1 section, 19 students

**Certificate for Certified Financial Planner
Investments Course**

Sept 1999	CFP 2 Investment Planning	University of Phoenix-CFP Certification
January 2000	CFP 2 Investment Planning	University of Phoenix-CFP Certification
January 2001	CFP 2 Investment Planning	University of Phoenix-CFP Certification
Summer 2001	CFP 3 Investment Planning	Metro State College at TIAA-CREF
Fall 2001	CFP 3 Review Course	Metro State College at Tivoli
Fall 2001	CFP 3 Investment Planning	Metro State College at Tivoli
Spring 2002	CFP 3 Investment Planning	Metro State College at Tivoli
Fall 2002	CFP 3 Investment Planning	Metro State College at Tivoli
Fall 2002	CFP 3 Review Course	Metro State College at TIAA-CREF
Spring 2003	CFP 3 Investment Planning	Metro State College at TIAA-CREF
Summer 2004	CFP 3 Investment Planning	Metro State College at Tivoli
Summer 2005	CFP 3 Investment Planning	Metro State College
Spring 2006	CFP 3 Investment Planning	Metro State College
Summer 2007	CFP 3 Investment Planning	Metro State College
Summer 2008	CFP 3 Investment Planning	Metro State College
Spring 2010	CFP 3 Investment Planning	Metro State College
Summer 2011	CFP 3 Investment Planning	Metro State College

**School of Business
University of Colorado, Denver**

Summer 2001	Corporate Finance BUSN 6640	Graduate Finance Course, 51 students
Spring 2002	Corporate Finance BUSN 6640	Graduate Finance Course, 47 students