CURRICULUM VITAE

Harry M. Starn, Jr., MS, CFP®, CFA
Director, Personal Financial Planner Program
Teaching Professor, Leeds School of Business

UNIVERSITY ADDRESS:

University of Colorado Boulder
Leeds School of Business
995 Regent Drive
Boulder, Colorado 80309
harry.starn@colorado.edu
(303) 492-7658

EDUCATION:

M.S. Finance, University of Colorado, Boulder, CO, 1990
B.S., Engineering, United States Military Academy, West Point, NY, 1975

PROFESSIONAL CERTIFICATIONS:

CFP® Certification, Certified Financial Planner Board of Standards, 2005
CFA Charter, CFA Institute, Charlottesville, VA, 1994

HONORS AND AWARDS:

Promotion to Teaching Professor (2022)

Joseph L. Frascona Teaching Excellence Award, Leeds School of Business (2021)

Named as Director of the Personal Financial Planner Program at CU-Boulder, Leeds School of Business (2018)

California Lutheran's School of Management Advisory Council's Award for "Demonstrated Excellence and Outstanding Achievement in the Area of Teaching" (2016)

United States Distance Learning Association's "Best Practices Bronze Award for Excellence in Distance Learning Teaching" (2010)

Elected to the CFP Board of Standard's Council on Education (elected as Chair 2015; Council Member 2012, 2013 and 2014)

Invited to serve on the FPA National Retreat Task Force and invited to co-present "Applying Adult Learning Theory to the Delivery of Financial Planning" (2014)

Named as Director of California Lutheran's Financial Planning Program (2013)

Named as California Lutheran's Director of Distance Learning (2013)

Invited to present at CFP Board's Registered Programs Conference (2010, 2011, 2012, 2017, and 2023)

Invited to participate in California Lutheran's Lutheran Identity Tour (2015)

Selected as grader for the National Financial Planning Challenge, San Diego (2011)

ACADEMIC EMPLOYMENT EXPERIENCE:

Director of the Financial Planning Program and Teaching Professor
University of Colorado - Boulder (2018-present)

- Administrative duties as Director of the Financial Planning Program
  - General program administration, including communication with the CFP Board to include reporting students who are eligible to sit for the CFP® Exam and program registration, leadership for curriculum development, draft and monitor budgets, prepare reports
  - Faculty and staff, including identify and mentor new faculty, hold regular meetings with adjunct faculty, share best practices and evaluate performance
  - Student affairs, including academic advising, career mentoring, communicating scholarship and internship opportunities
  - Promotion and recruitment, including participation in Leeds marketing and program recruitment efforts, partnering with academic advisers and career-services personnel
  - Coordinator of the Leeds Certificate in Personal Financial Planning with responsibilities for communicating with students, coordinating experiential activities, and working with Registrar's office for declaring students and ensuring certificates are awarded
  - Community outreach, including identify, build relations and communicate with key partners, assist in the organization of public events to include guest speakers, develop key relations with industry organizations and advocate for student scholarship opportunities
  - Collaborate with Academic Advancement Office and Burridge Center of Finance to promote the PFP Premier Partner Network. The network includes financial services firms who are committed to championing the PFP Program through financial donations, student internship opportunities and thought leadership
  - Alumni relations, including cooperate with Leeds advancement and alumni relations, and communicate with alumni of the program
- Courses taught within undergraduate degree program
  - FNCE2820 – Introduction to Personal Finance
  - FNCE2830 – Personal Investment Management
  - FNCE3030 – Investments and Portfolio Management
  - FNCE3040 – Retirement Planning
  - FNCE3820 – Principles of Personal Financial Planning and Insurance
  - FNCE4840 – Personal Financial Planning Capstone
- Courses taught within graduate degree program
  - MBAX6221 – Investment Management and Analysis
- Courses taught within PFP certificate program
  - Introduction to Personal Financial Planning and Insurance

        - Retirement Planning
        - Investment Planning
        - Capstone Course
        - CFP® Exam Review Course (all topics)
    - Course creation (hybrid certificate program):
        - Introduction to Financial Planning and Insurance
        - Retirement Planning
        - Capstone Course

Director of the Financial Planning Program and Senior Lecturer
California Lutheran University (2013-2017)

- Administrative duties as Director of the Financial Planning Program
    - General program administration, including leadership for curriculum development, develop and review program mission and learning objectives, plan and implement program reviews, review course evaluations and provide feedback to faculty, manage faculty and staff, draft and monitor budgets, prepare reports and work with colleagues, other Directors, Department Chairs and Deans in developing effective strategic plans
    - Faculty and staff, including identify and mentor new faculty, assist faculty in syllabi creation, hold regular meetings, share best practices and evaluate performance
    - Student affairs, including advising and mentoring, review applications, create program enhancements for students and assist with creation of handbooks or similar material for students
    - Promotion and recruitment, including participation in School- and University-level marketing, recruitment planning and information sessions, and coordination with University Marketing, Media Creation and Admissions
    - Community outreach, including identify, build relations and communicate with key partners and advisory board members, assist in organization of public events, represent the University as a speaker, develop key relations with other schools and organizations and pursue grant opportunities
    - Alumni relations, including cooperate with University Advancement and Alumni Relations, communicate with Alumni and attend commencement-related activities
- Courses taught *(course prefixes and numbers changed in August 2017):*
    - MFP521 – Introduction to Financial Planning *(online)*
    - MFP525 – Employee Benefits and Retirement Planning *(online)*
    - MFP535 – Psychological-Cultural Dynamics of Communication and Persuasion *(online)*
    - MFP536 – Social Psychology of Leading Clients *(online)*
    - MFP545 – Behavioral Finance *(online)*
    - MFP597 – Applied Research in Financial Planning *(online MS Capstone)*
    - MFP598 – Capstone Course in Financial Planning *(online and classroom)*
- Course creation:
    - MFP535 – Psychological-Cultural Dynamics of Communication and Persuasion
    - MFP536 – Social Psychology of Leading Clients *(online)*
    - MFP597 – Applied Research in Financial Planning *(online)*
- Course revisions:

- MFP521 – Introduction to Financial Planning *(online)*
- MFP525 – Employee Benefits and Retirement Planning *(online)*
- MFP598 – Capstone Course in Financial Planning *(online and classroom)*

Director of Distance Learning
California Lutheran University (2013-2016)

- Leadership duties as Director of Distance Learning
  - Promote the expansion of distance learning instruction, including provide leadership for distance-learning integration, alignment with Cal Lutheran's strategic plan of adding hybrid (blended) and fully online programs, remain current to technological and educational-market changes, develop team-based course development structure
  - Develop quality standards for distance learning, including advance policies and procedures that will promote best practices in course creation and delivery, establish expectations of quality and benchmarks of success
  - Compliance, including oversee deployment of distance-learning applications, state and federal distance-learning regulations and requirements, ADA standards for accessibility (Americans with Disabilities Act)
  - Support academic programs, including development of fully-online and blended/hybrid courses, pilot studies, scholarly research
  - Support faculty development, including team with CTL in offering necessary faculty training, access to courses in the learning management system, support and research the use of educational technology
  - Foster communication for distance-learning initiatives between academic and administrative departments and faculty committees, including: undergraduate and graduate programs, Center for Teaching and Learning, ISS, Office of Institutional Effectiveness, faculty committees, admissions, business office, registrar's office, marketing, media services, campus support services, alumni relations
  - Assist in acquiring grants and partnerships, which will promote distance learning initiatives.

Associate Director and Executive Faculty, MBA in Financial Planning Program,
California Lutheran University (2009-2013)

- Administrative duties as Associate Director
  - Develop and update new courses and curriculum as needed and ensure materials are consistent with WASC and CFP Board standards.
  - Serve as sole project manager for all course content development and primary liaison between content writer and peer reviewer
  - Work with colleagues on assessment of learning outcomes and on recruitment and retention of students.
  - Serve as the project manager for all advertising campaigns
  - Coordinate creation and change of all website and marketing materials, ensure advertising is suitable to CFP Board of Standards and coordinate joint marketing projects
  - Assists program director in creating and monitoring the program budget, program review documents and program award submission materials

        - Active involvement in adjunct faculty recruiting and new faculty training/mentoring, particularly as it relates to online teaching
        - Serve as the major liaison between students and CIF, including the promotion of the alumni network
        - Interact with business and non-profit community to develop learning and service-learning projects and opportunities for students
        - Participate in CLU, School of Management, and CIF projects, events and committee work
    - Courses taught:
        - BUS501 – Introduction to Financial Planning *(online)*
        - BUS505 – Employee Benefits and Retirement Planning *(online)*
        - BUS506 – Risk Management and Insurance *(online)*
        - BUS508 – Capstone Course in Financial Planning *(online and classroom)*
        - BUS564 – Behavioral Finance *(online)*
        - BUS591 – Financial Principles and Policies *(online and classroom)*
        - BUS593 – Investments *(online)*
    - Course creation:
        - BUS508 – Capstone Course in Financial Planning *(online and classroom format consistent with the 2012 CFP Board requirements for a Financial Plan Development Course with oral and written presentations)*
    - Courses revisions:
        - BUS505 – Employee Benefits and Retirement Planning *(online)*
        - BUS506 – Risk Management and Insurance *(online)*
        - BUS564 – Behavioral Finance *(online)*
        - BUS591 – Financial Principles and Policies *(online)*

Adjunct Faculty, MBA in Financial Planning, California Lutheran University (2005-2008)

- Courses taught:
    - BUS501 – Introduction to Financial Planning *(online)*
    - BUS508 – Capstone Course in Financial Planning *(online)*
    - BUS591 – Financial Principles and Policies *(online)*
    - BUS593 – Investments *(online)*
- Courses created:
    - BUS501 – Introduction to Financial Planning (*online course*)
    - BUS508 – Capstone Course in Financial Planning (*online course*)
    - BUS593 – Investment & Portfolio Management (*online course*)

Adjunct Faculty, School for Professional Studies, Regis University, Denver (2003-2007)

- Courses taught:
    - FIN400 – Business Finance *(classroom)*
    - FIN420 – Advanced Corporate Finance *(classroom)*
    - FIN435 – Fundamentals of Investment *(classroom and online)*
    - FIN440 – Financial Analysis, Forecasting and Planning *(classroom)*
    - FIN450 – Sources of Capital *(classroom)*
    - PA410 – Public Finance *(online)*
- Courses created
    - FIN450 – Sources of Capital *(classroom)*
    - PA410 – Public Finance *(online)*

OTHER WORK EXPERIENCE:

Action Financial Planning, LLC, Principal *(formerly Boulder Capital Management, LLC. money management and fee-only planning)* 1996-2010

Lipper Analytical Services Inc., Manager Special Directors' Services *(consultant to the mutual fund industry)* 1993-1995

Financial Network Investment Corp, Registered Representative *(financial planning)*, 1990-1992

Corporate Management/Ownership, Starns' Markets Inc. *(retail business management, 700+ employees)* 1980-1986

United States Army, Signal Corps *(Captain)* 1975-1980

SCHOLARLY ACTIVITIES

Presentations:

- Keynote presentation during Leeds Financial Literacy Day entitled "The Psychology of Financial Well-Being – The inner game of money mindfulness" (Oct 2024)
- Panelist on Conference of World Affairs workshop "Personal Finance: Planning for Success (Apr 2024)
- Presentation to NROTC Battalion "Financial Planning for Military Service Members and their Families" (Apr 2024)
- "Investing Basics Workshop" for students within the Basic Needs Center (Oct 2023)
- Panelist on the "Building the Psychology of Financial Planning into Your Curriculum" session during the CFP Board Registered Programs Conference (Oct 2023)
- "Creating an Integrated Cross-Disciplinary Course" presentation at the CFP Board's Registered Programs Conference in Washington, D.C. (Feb 2017)
- "Applying Adult Learning Theory to the Delivery of Financial Planning," co-presentation at the national FPA Retreat (Apr 2015)
- "Leadership from the Ground Up: Small School Experience," panel presentations at the National UPCEA conference in Washington, D.C. (Mar 2015)
- "Principles of Managing Time and Boundaries in the Virtual Classroom," CTL presentation (Nov 2014)
- "Supporting International Students at CLU" workshop at Cal Lutheran's administrative day (June 2013)
- "Hybrid Courses – Workshop 3" presentation for the Graduate School of Education (Nov 2012)
- "Hybrid Classes – Workshop 2" to the Graduate School of Education, presentation with Cindy Grether (Oct 2012)
- "Hybrid Classes – Workshop 1" to the Graduate School of Education, presentation with Cindy Grether (Oct 2012)
- Panelist at the CFP Board's 2012 Registered Program Conference in Washington D.C. The panel discussion was entitled, "Capstone Course: Now that I've taught it, what have I learned" (Aug 2012)

- "The Selling Side of Relationship Management," a three-part workshop co-presented with Richard McAndrew (Apr 2012)
- "Online Learning at CLU" presentation as part of panel at CLU's Faculty Retreat, (Aug 2011)
- "Evolution of an Online Financial Plan Development Course – from Group to Individual Format with Oral and Written Assignment Components" presented at the 2011 CFP Board's Registered Program Conference in Washington, D.C. (Aug 2011)
- "Supporting and Nurturing Faculty in a High-Expectations Online Program" presentation with Cindy Grether during the USDLA National Convention, St. Louis (May 2011)
- "Going to College Online: The Future of CLU Traditional Undergrads?" presentation with Dean Joan Griffin during CLU's Professional Development Day (May 2011)
- "Course Development, Sustainability and Positioning for Growth" presentation at CLU's Winter Faculty Retreat (Jan 2011)
- "The Future of Learning in a Digital Age," presented at the November 2010 MIT Enterprise Forum Event in Santa Barbara, California.
- "Anatomy of a Successful Online Capstone Course with a Written Comprehensive Plan Component" presented at the 2010 CFP Board Program Directors' Conference in Washington, D.C. (Aug 2010)
- "Engagement and Improvement in Distance Learning," presented at CLU's Professional Development Day (May 2010)
- "Creating and Presenting Investment Policy Statements" presentation at the October 2009 FPA Ventura Chapter quarterly meeting.

Publications, Scholarly Research and Peer Reviews

- Co-author on the 11th Edition of "Practicing Financial Planning for Professionals" with Dr. Anandi P. Sahu and Dr. Sid Mittra. (ISBN: 978-1-4771-4377-3)
- Peer Reviewer – "The Case Approach to Financial Planning: Writing a Financial Plan" by John E. Grable, Derek D. Klock and Ruth H. Lytton
- Peer Reviewer - "The Process of Financial Planning: Developing a Financial Plan" by Ruth H. Lytton, John E. Grable and Derek D. Klock
- Authored the book, "How to Succeed at a Private College or University – An insider's perspective on thriving in the classroom and creating a meaningful college experience. (CreateSpace publishing, November 2016; Kindle publishing July 2017)
- "Designing and Facilitating Virtual Seminars" (faculty guide, Dec 2014)
- "Assessing the Empirical Evidence and Creating and Facilitating Blended-Learning Undergraduate Classes" (faculty guide, May 2014)
- "Supporting the Learning Experience of International Students in our Classrooms" (faculty guide) 2012
- "Optimal Duration for an MBA Online Course: A Discussion of Cost-Benefit Decision Factors" (analysis for School of Management, May 2014)

Teaching-related Technology and Classroom Seminars Attended

- Attended virtual workshop entitled "Harnessing Gen AI in the Undergraduate Classroom (Oct 2024)
- Faculty AI Teaching and Learning Workshop 2: Exploring Your Class with AI (Aug 2024)
- Teaching Lecture Series, Class Motivation (Feb 2024)

- Trouble-Shooting Survival Skills (for a digital world), Tracy Jennings (Feb 2023)
- Online cheating: detection, prevention, testing alternatives and the honor code, Tracy Jennings (Mar 2021)
- Active learning with games and problem-solving exercises in Zoom breakout rooms, Tracy Jennings (Feb 2021)
- How to Use the New Canvas Studio, Tracy Jennings (Oct 2020)
- Advanced Zoom Training, Tracy Jennings (Jul 2020)
- Workshop #3 – How to Engage Students on Live Zoom Calls (Jun 2020)
- Workshop #1 – Make Videos to Deliver Course Content, Tracy Jennings (Jun 2020)

UNIVERSITY AND DEPARTMENT SERVICE

- Serve on the Teaching Professor LSPAC (2024, 2023)
- Co-organizer for PFP Denver Trek and the PFP Alumni Event (Nov 2024)
- Organized and facilitated the Leeds Financial Literacy Day (Oct 2024, Oct 2023)
- Represented the Financial Division at the Diversity Affair Office's "Business at a Glance Day (Oct 2024)
- Organized and facilitated the Personal Financial Planning and Wealth Management Career Networking Event at Leeds (Mar 2024, Mar 2023, Oct 2022, Mar 2022, Oct 2021, Mar 2021, Nov 2020)
- Two-part presentation on "Crash Course in Personal Finance" to the Leeds Dean's Student Council (Mar 2024)
- Panelist on First-Generation Scholars Financial Wellness Event (Feb 2024)
- Co-organizer for PFP Denver Trek (Nov 2023)
- Represented the PFP Program at the CFP Board's Conference for registered programs and firms in Washington, DC (Oct 2023)
- Represented the Finance Division at the Office of Diversity Affair's "Business at a Gland Day" (Sep 2023, 2022)
- Two-part presentation on "Crash Course in Personal Finance" to the Leeds Dean's Student Council (Apr 2023)
- Represented the PFP Program at the CFP Board's Conference for registered programs and firms in Washington, DC (Aug 2022)
- Attended the Investment News Women Advisors Summit in Denver with Leeds students (July 2022)
- Presentation on "Fostering student engagement in your remote/online classes" (CTL, Jan 2021)
- Represented the financial planning program at the CFP Board's virtual Program Conference (Dec 2020)
- Created Securities Industry Securities (SIE) course (Aug-Dec 2020)
- Presentation on "Taking control of your personal finances" to students within the Transfer Success Seminar (Nov 2020)
- Presentation of "Financial Planning during the COVID-19 Crisis" to webinar attendees (Leeds webinar series, July 20)
- Presentation of "Building your Canvas Classroom" at financial faculty lunch (Jun 20)
- Presentation "High-deductible Healthcare Plan with Health Savings Account" to Leeds faculty (Apr 20)
- Presentations on "Navigating the features of Zoom" and "8 Suggestions for Facilitating your Live Class at Distances" (synchronous) to Leeds faculty (Mar 2020)

- Presentation on “Taking proactive control of your financial future” to attendees on workshop organized by Rec Center (Feb 2020)
- Develop CU’s Personal Financial Planning Certificate Program (2018-2019)
- Serve on the Leeds School of Business Distance Learning Committee (2018-2020)
- Participated in the Leeds RAP (certificate program) panel discussion (Nov 2018)
- Attended the Rocky Mountain News Women Advisors Conference with five students from the program (Sep 2018)
- Attended the Schwab Explore Conference in Avon, Colorado, with two students from the program (June 2018)
- Attended the CFP Board’s Registered Programs Conference in Washington DC (Feb 2018)
- Primary author of WSCUC Substantive Change Application for delivering the MS in Financial Planning as a fully online program (2017)
- Represented the Advising and Mentoring Committee at the Denver Advisor Bootcamp (March 2017)
- Attended the CFP Board’s Registered Programs Conference and the Academic Research Colloquium in Washington DC (February 2017)
- Represented the financial planning program at the Wealth and Asset Management Research Conference, Washington University, St. Louis (August 2017)
- Member of the MPPA Search Committee (2017)
- Primary author of “Feasibility Study: Expansion of the MBA-FP Program – Adding an MS in Financial Planning Degree” (2016)
- Primary author of “Feasibility Study: Expansion of the MBA-FP Program – Adding a Bachelor Degree Minor in Financial Planning” (2016)
- Primary author on the MBA-FP Program Review (2015)
- Chair of Cal Lutheran’s Faculty Advising and Mentoring Committee (academic years 2015-16 and 2016-17)
- Represented Cal Lutheran’s distance learning team at the Chicago ELCA Academic Learning Exchange Meeting (November 2015)
- Represented the University at the UPCEA Summit Online Leadership conference, San Antonio (Jan 2015)
- Member of CIO Search Committee (Dec-May 2015)
- Represented Cal Lutheran at CFP Board’s Firm Conference in Washington, DC and spoke as a panelist (Dec 2014)
- Member of the UPCEA Network for Small and Specialized Institutions (2014-15)
- Elected to serve on FADC (2014-15)
- Attended the CFP Board’s Registered Programs Conference in Washington DC (Aug 2014)
- Represented Cal Lutheran at the NetVue Conference on “Vocation and the Common Good: Mentoring and Advising Students” at Fontbonne University (Feb 2014)
- Represented Cal Lutheran at the Online Leadership and Strategy Conference (Jan 2014)
- Attended a three-day grant writing workshop at UCSB (Nov 2013)
- “Moving Forward with CLU’s Strategic Plan” presented to CLU’s Board of Regents, Oct 2013
- Represented MBA-FP at the FPA Northern California meeting (Sept 2013)
- Attended the CFP Board’s Registered Programs Conference in Washington DC (Aug 2013)
- Attended the Blackboard World conference (July 2013)
- Member of Instructional Designer Search Committee (Feb-May 2013)

- Invited to service on Cal Lutheran's Blackboard transition team
- Organized and facilitated the 2013 Faculty Winter Retreat (as chair of TLC)
- Member of School of Management Dean Search Committee (Sept-Dec 2012)
- Chair of Cal Lutheran's Faculty "Teaching and Learning Committee" (2011/2012 and 2012/2013)
- Member of MBA New Course Structure Task Force (2012)
- "Dealing with International Student Issues" presentation during CTL luncheon, September 2012
- Attended the CFP Board's Registered Programs Conference in Washington DC (Aug 2012)
- "Supporting International Graduate Student Learning at CLU," presented as part of panel at CLU's Professional Development Day, May 2012.
- Represented CLU at the Lilly Conference "Teaching for Brain-Based Learning" (March 2012)
- Organized and facilitated the 2012 Faculty Winter Retreat (as chair of TLC)
- "Teaching a Hybrid Course – What's in it for Me?" presented at the Center for Teaching and Learning lunch, November 2011
- Member of CLU's Strategic Planning Work Team 3 (2011)
- Established a formal, paid internship program for students with Ameriprise Financial advisors; the internship was formally announced during a presentation in Santa Barbara (September 9, 2011)
- "Current State of Online Learning" presented to CLU's Board of Regents, February 2011
- Participated in Patriot Day reach-out to Ventura Naval Base enlistees (October 1, 2011, organized by Cindy Keitel)
- Committee Member, Teaching and Learning Committee (2010-2011)
- Participated in Patriot Day reach-out to Ventura Naval Base enlistees (September 11, 2010, organized by Cindy Keitel)
- Collaborated with CIF team to develop the virtual military lounge and alumni portal.
- Primary author of award materials submitted to USDLA (2010)
- Primary author on the MBA-FP Program Review (2010)
- Faculty Mentor for the Fourth Annual Festival of Scholars (2010)
- Presentations to General MBA Online Faculty on: "Facilitating your Online Course." (2010)
- Presentations to General MBA Online Faculty on: "Best Practices for your Virtual Classroom" (2010)
- Created CIF Pre-Prep course for students intending to sit for the CFP Exam
- Faculty Mentor for the Third Annual Festival of Scholars (2009)

COMMUNITY AND PROFESSIONAL SERVICE

- Presentation "Online Classroom Facilitation" to Niwot High School faculty (Aug 2020)
- Grader in the Rocky Mountain Investment Challenge at Colorado State University (April 2018)
- Served on the FPA National Retreat Task Force (planning for 2015 national retreat)
- Served on the CFP Board's Council on Education (starting 2012 for *three-year term;* served a fourth year as Chair)
- Served as Chairman of the Programs Committee for Ventura Chapter of the FPA, 2010-11 *(2 years)*

- Served on the Board of Directors for the Ventura Chapter of the Financial Planning Association 2010-2011 *(2 years)*
- “Living within Your Means” presentation at the Senior Congress IX in Westlake Village, CA, February 5, 2013.
- “Living within Your Means” workshops presented for the Ventura County Area Agency for the Aging at:
    - Senior Center, Fillmore, June 2013
    - Senior Center, Santa Paula, April 2013
    - Goeble Senior Center, Thousand Oaks, August 2012
    - Senior Center, Santa Paula, June 2012
    - Simi Valley Senior Center, May 2012.
- Selected to grade the national Financial Planning Challenge 2011 (panel of five). The competition was held in conjunction with the FPA national convention (September 15 and 17). The competition was sponsored by the Academy of Financial Services, Ameriprise Financial, CFP Board of Standards and Financial Planning Association.
- Co-organized “America Speaks” workshop at Overton Hall on May 20, 2011. The workshop educates and engages participants about options for balancing the national budget.
- Invited to serve on the CFP Board’s Financial Plan Development Course Case Review Working Group (2010-2011)
- “Hedge Funds” presentation to FPA Study Group, 2010
- Represented the Ventura Chapter at the FPA Chapter Leaders Conference in Broomfield, CO (November 5-7, 2010).
- Accepted an invitation to serve on Financial Services Advisory Board for Berkeley College, New York, NY. (Aug 2010)
- “Financial Planning in a Recession” presentation to the general public, Roth Nelson room, April 2009.

PROFESSIONAL MEMBERSHIPS

- Certified Financial Planner (CFP®)
- CFA Institute (CFA)
- Financial Planning Association (FPA)

END