

ACADEMIC EXPERIENCE

University of Kentucky, Lexington, Kentucky, July 2014 – Present

Department of Finance and Quantitative Methods, Gatton College of Business and Economics

- Senior Lecturer of Finance, July 2014 – Present
- Marguerite Pelissier Teaching Fellow, 2016 – Present
- Director of Wall Street Scholars, August 2019 – Present
- Director of Undergraduate Studies, August 2017 – August 2022

Vanderbilt University, Nashville, Tennessee, August 2022 – present

Adjunct Professor of Management, MBA Program, Owen Graduate School of Management

Texas A&M University, College Station, Texas, August 2008 – June 2014

Clinical Assistant Professor, Department of Finance, Mays Business School

American University, Washington, D.C., August 2003 – July 2008

Assistant Professor, Department of International Business, Kogod School of Business

EDUCATION

- Ph.D. (Finance), *Indiana University*, Bloomington, Indiana
- M.B.A., *Wake Forest University*, Winston-Salem, North Carolina
- B.A. (International Finance), *Capital University of Economics and Business*, Beijing, China

TEACHING AWARDS & HONORS

- Sole recipient, Marguerite Pelissier Teaching Fellowship, University of Kentucky, 2016 – Present
- Recipient (1 of 6), UK Alumni Association Great Teacher Award, 2019
- Recipient (1 of 7), University of Kentucky Outstanding Faculty Teaching Award, 2018
- Recipient (1 of 2), Gatton College Teaching Excellence Award, 2018
- Faculty Advisor of the Finance Society, Winner of “Best Student Organization of the Year,” 2018, Gatton College
- Recipient (statewide), “Teachers Who Made a Difference”, 2015, 2016, 2017, 2018, 2019, 2020
- Recipient, Mentor of the Week, University of Kentucky, 2017
- Recipient, Humana Teaching Innovation Proposal Grant (peer-reviewed), Gatton College, Summer 2016
- Recipient, Lockheed Martin Aeronautics Company Excellence in Teaching Award, Mays Business School, Texas A&M University, 2013
- Recipient, Mays Summer Teaching Grants, Texas A&M University, 2012 & 2013
- Nominee, University of Kentucky Outstanding Faculty Teaching Award, 2022
- Nominee, Ken Freedman Outstanding Faculty Advisor Award, University of Kentucky, 2017
- Nominee, "Inspirational Women of Gatton" award, University of Kentucky, 2014 & 2015
- Nominee, Teacher-Scholar Award, Texas A&M University, 2012

TEACHING EXPERIENCE

University of Kentucky, Gatton College of Business and Economics, Lexington, Kentucky, 2014 – Present

- **Median Instructor Ratings: 4.5/5.0 for class of <50 and 4.0/5.0 for class of 250+**
- Introductory Corporate Finance (undergraduate level; average of 400+ students/session; ~5,500 students taught in 6 years)
- Introductory Corporate Finance (undergraduate Honors)
- Intermediate Corporate Finance (undergraduate level, case studies)
- International Finance (undergraduate level)
- Fixed Income Securities (undergraduate and Master of Science in Finance, scheduled for Spring 2023)
- CFA Exam Level I Fundamentals (undergraduate and Master of Science in Finance)
- Industry Applications of Data Science for Finance Students (undergraduate level; co-instructor)
- Careers in Finance workshop (undergraduate and Master of Science in Finance)
- Independent Studies/Research in Equity Research, Investment Banking, Data Science, and other subjects (undergraduate level)
- Experiential Learning (supervised 55 undergraduate internship courses), Fall 2014 – Summer 2017

Vanderbilt University, Owen Graduate School of Management, Nashville, Tennessee, August 2022 – present

- **Median Instructor Ratings: 5.0/5.0**
- Corporate Financial Policy (second-year MBA elective, case studies)

China University of Mining and Technology, Xuzhou, China

- Guest Lecturer, Investment Decision Rules (MBA level), March 2016

Beijing JiaoTong University, Beijing, China

- Guest Lecturer, Investment Decision Rules (undergraduate level), March 2016

Texas A&M University, Mays Business School, College Station, Texas, 2008 – 2014

- Introductory Corporate Finance (undergraduate level, general and honor sections)
- Introduction to Financial Management (graduate level non-business majors, *online*)
- Managerial Finance (undergraduate intermediate level and graduate level)
- Funding International Business/International Finance (undergraduate level)
- Special Topics: the Chinese Financial System (undergraduate level, Study Abroad program)
- Directed Studies (undergraduate level)

American University, Kogod School of Business, Washington, D.C., 2003 – 2008

- International Finance (undergraduate and MBA level)
- Fundamentals of International Business (undergraduate level)

Indiana University, Kelley School of Business, Bloomington, Indiana, 1999 – 2003

- Equity and Fixed Income Investments (undergraduate level)
- Associate Instructor, Introductory Corporate Finance (undergraduate level)

ADMINISTRATIVE EXPERIENCE AND UNIVERSITY SERVICE

University of Kentucky, 2014 – Present

- Director, Undergraduate Studies in Finance, Fall 2017– Summer 2022
 - Represent the department in discussions of undergraduate academic affairs across campus
 - Evaluate and approve equivalent courses for transfer from international and U.S. universities
- Member, Lewis Honors College Appointment and Promotion Committee, Fall 2022 – Present
- Member, UK Nominating Committee for the Rhodes Scholarship and the Marshall Scholarship, Fall 2019 – Present
- Member, Experiential Education Committee, University of Kentucky, Fall 2018 – Present
- Member, Undergraduate Studies Committee, Gatton College, Fall 2017 – Present
- Affiliate, Institute for the Study of Free Enterprise, Gatton College, 2016 – Present
- Member, Graduate Studies Committee for Master of Science in Finance, Gatton College, 2017 – 2022
- Member, Gaines Fellows Thesis Committee for Hadeel Abdallah (2019 Rhodes Scholar), Fall 2019
- Member, Selection Panel for the University of Kentucky Outstanding Teaching Award, Spring 2019
- Member, Chellgren Center for Undergraduate Excellence Committee, Fall 2018 – Spring 2019
- Co-sponsor, Certificate in Financial Planning (CFP) program, Fall 2018 – Spring 2019
- Member, University of Kentucky Freshmen Initiative Organization Committee, Fall 2018
- Member, Faculty Merit Review Committee, Department of Finance and Quantitative Methods, 2017
- Founding Faculty Advisor, Investment Banking Club, Fall 2019 – Spring 2020
- Faculty Advisor, UK Women’s Volleyball Club, Fall 2019 – Spring 2020
- Faculty Advisor, Wildcat Investment Club, Fall 2014
- Faculty Mentor, Chellgren Freshmen Pilot Program, Fall 2018 – Spring 2019
- Judge, Von Allmen Center for Entrepreneurship, Entrepreneurs’ Bootcamp Pitch Competition, Fall 2018
- Judge (1 of 3), University of Kentucky Homecoming Royalty Interviews, 2015
- Selected Invited Speeches: University of Kentucky 2018 International Graduate Teaching Assistants Orientation Keynote Speaker (120+ participants), UK Singletary Scholars, National Society of Black Engineers, Business Enterprise Living Learning Program, Gatton Honors Pathway Program, Guest lecture to Chinese Financial System (ECON 499) and others

Texas A&M University, 2008 – 2014

- Director, Bachelor of Business Administration (BBA) – Finance Program, 2013 – 2014
- Co-Chair, Finance Department Recruiting Committee for Non-tenure Track Positions, 2012 – 2014
- Faculty Representative, Finance Department Scholarship Committee, 2013
- Member, Mays Business School Undergraduate Curriculum and Assessment Committee, 2012 – 2014
- Faculty Advisor, Aggie Investment Club, 2010 – 2014
- Faculty Advisor, Texas A&M Team Handball, 2009 – 2014
- Member, Faculty Senate Non-tenure track Faculty Sub Committee, 2013 – 2014
- Mays Business School Brown-Rudder Candidate Review Committee, Spring 2014
- Mays Business School Gates-Muller Candidate Review Committee, Spring 2014
- Committee Chair (*ex-officio*), Professional Program of Accounting, MS in Finance, 2012 –2013
- Member, Online Learning Committee, 2011 – 2012
- Member, Honors Program Committee, 2010 – 2012
- Member, The Review Committee of Center for Retailing Studies, 2011
- Member, Department of Finance Scholarship Committee, 2009
- Member, Undergraduate Program Task Force, 2009
- Academic Advisor, Bachelor of Business Administration (BBA) – Finance Program, 2009
- Judge, Mays Business School Freshman Business Initiative team presentations, 2013
- Interviewer, TAMU University Scholars, 2013

- Reviewer, TAMU Graduate Merit Fellowship applications, 2012
- Judge, Trading, Risk and Investment Program (TRIP) student presentations, 2012
- Judge, Annual Texas A&M University System Pathways Student Research Symposium, 2011
- Advisory Committee member, Master of Science in Mathematics, 2013
- Advisory Committee member, Master of Science in Industrial Engineering, 2012
- Advisory Committee member, Master of Science in Economics, 2009 & 2010
- Participant, Business Student Council's Parents' Weekend, 2011 – 2013
- Invited speaker, Biotechnology Industry Advisory Council Student Development Conference, Texas A&M University, 2012

EXPERIENTIAL LEARNING DEVELOPMENT AND SUPERVISION

University of Kentucky, 2014 – Present

- Director, Wall Street Scholars, Department of Finance and Quantitative Methods, Fall 2019 – Present
 - Created and designed the freshmen program to position finance students for career development success through advanced curriculum and exclusive co-curriculum
 - Raised \$21,000+ for program support in 10 months and obtained other support for scholarships and career development funding
 - Recruited and coached 20+ freshmen annually
 - Provided training workshops, organized networking meetings and conducted mock interviews
- Director, Pelissier Scholars Wall Street Experience, May 2017 – Present
 - Initiated the week-long student group visit to Wall Street in 2017 after securing funding for scholarships
 - Designed applications online, reviewed applications and interviewed dozens of candidates annually, created an annual itinerary of 15-18 company visits, arranged all logistics of the visits including housing for the student group, completed pre-trip training for the students including resume editing and orientation workshops, and mentored students in post-trip career development
 - Cultivated recruiting partnerships and collaborations with dozens of firms and industry contacts
 - Annually coach 40-60 Pelissier Scholars from admission through graduation in career development
- Manager, Business College Finance Data and Access, May 2017 – Present
 - Oversaw faculty and students' access to Capital IQ (by S&P Global)
 - Schedule and staff the Bloomberg lab
- Member, Graduate Studies Committee for Master of Science in Finance, Gatton College, 2017 – 2022
 - Offered career development workshops and individual counseling to dozens of MSF students
 - Assisted in students' placement in investment management, private wealth management, commercial banking, consulting, and financial planning and analysis
 - Collaborated with MSF alumni to assist current students in career development and job placement by including recent MSF graduates to the UK Finance Alumni Network (UKFAN)
 - Assisted in recruiting MSF students by promoting the program at colleges across Kentucky
- Founding Faculty Advisor, Finance Society, Fall 2015 – Spring 2020
 - Winner of "Best Student Organization of the Year," Gatton College, 2018
 - Founded the student organization to enhance finance career development for undergraduate and master's students
 - Membership grew from <10 to 700+ in 5 years
- Co-organizer, Finance & Accounting Success Track (FASTRack), University of Kentucky, July 2019
 - Collaborated with an accounting faculty member to organize and raise funding for the first 4-day workshop hosted at the University
 - Selected and educated ~25 high school students, mostly under-represented minority students, in accounting and finance careers through company visits, guest lectures, and workshops

- Internship Coordinator, Department of Finance and Quantitative Methods, Fall 2015 – Spring 2019
 - Introduced *Wall Street Prep* seminars on Financial Valuation, Excel Modeling, and M&A and LBO Modeling to campus in Fall 2015 and saw ~500 registrants in the past six years
 - Reviewed and edited hundreds of student resumes
 - Coached and provided career advice to hundreds of undergraduate and graduate students
 - Collaborated with the University and College career offices to foster recruiting opportunities and organize on-campus recruiting events
- Organizer, University of Kentucky Stock Pitch Competition, Spring 2018 – Spring 2019
 - Initiated in 2018 and organized the first stock pitch competition for freshmen through master-level students of all majors across UK campus annually
 - Formed the judge panel with investment industry experts
 - Coordinated with 12+ industry mentors, 20-30 student teams and 80-120 participants annually
 - Obtained annual funding support of ~\$4,000 - \$5,000
 - Saw a 30% increase in participation in the second year

EXTERNAL ENGAGEMENT AND FUND RAISING

- *Senior Advisor*: Evercap Advisors, Austin, TX investment bank, 2022 – present
- *Co-chair, Student Outcomes Committee*: Finance Alumni Board, June 2021 – present
 - Lead a group of six senior finance executives in mentoring and developing career opportunities for 70+ undergraduate finance scholars
- *Founder*, the UK Finance Alumni Network (UKFAN), consisting of 40 recent finance alumni who provide mentoring and career connections for finance students, in addition to philanthropic support for scholarships and program support
- Assisted in forming the Finance Advisory Board of 20+ senior finance industry leaders to mentor students pursuing finance careers, advise the faculty on curriculum, provide leads for industry positions, and provide philanthropic resources to support the scholarships for finance students
- Created 100+ recruiting relationships/partnerships and helped 100+ students obtain internships and full-time positions in financial services firms such as Goldman Sachs, JPMorgan, Bank of America, Morgan Stanley, and KKR
- Raised ~\$1.2 million to support scholarships for the Pelissier Scholars Program, research and teaching support for faculty members, and Bloomberg subscriptions since 2016
- Credited with developing the lead for a \$10 million endowment gift from a Lexington-based private equity firm to support scholarships for finance students and to support the Wall Street Scholars program developed in 2019
- *Featured Speaker*: UK Alumni Association 2020 Financial Wellness Webinar (400+ views)
- *Member*: Financial Executives International, 2016 – 2017

SELECTED PROFESSIONAL DEVELOPMENT ACTIVITIES

- *Invited participant (1 of 12 nationwide)*: **McGraw–Hill Corporate Finance Summit**, March 2018
- *Participant*: **Bloomberg for Education New York Event: How to Bring Bloomberg Into Finance Curriculum**, June 24, 2016
- *Participant*: **Harvard University Case Method Teaching Seminars**, Boston, MA, March 2015
- *Participant*: **University of Kentucky CELT (Center for the Enhancement of Learning and Teaching) workshops**, 2014 – Present

SELECTED PUBLICATIONS

- “Leasing on the Balance Sheet,” forthcoming, with Peter Chinloy and Matthew Imes, a chapter in Cheng-few Lee, Alice Lee and John Lee, editors, *Handbook of Investment Analysis, Portfolio Management and Investment Derivatives*, World Scientific.
- “The Role of Corporate Governance in Meeting or Beating Analysts' Forecasts,” 2011, with Davit Adut (University of Cincinnati) and Augustine Duru (American University), **Journal of Accounting and Public Policy**, vol. 30, iss. 2, Pages 188–198.
- “Eurocurrency Risk Premia,” 2009, with Bruce Resnick and Gary Shoesmith (Wake Forest University), **International Journal of Business**, vol.14, iss 3., Pages 199–220.
- “Cultural Dimensions, Risk Aversion and Corporate Dividend Policy,” with Dara Khambata (American University), **Journal of Asia–Pacific Business**, 2006, vol. 6, iss. 4, pp. 31–43.
- “Market Timing of International Stock Markets Using the Yield Spread,” with Bruce Resnick and Gary Shoesmith (Wake Forest University), **Journal of Financial Research**, 2004, vol 27, iss. 3, pp. 373–392.

PROFESSIONAL SERVICE

- *Invited reviewer*: **Corporate Finance by Pearson PLC**, 2018
- *Reviewer*: **PNC University of Kentucky Finance Conference**, 2018
- *Invited participant*: **Corporate Finance Online (CFO)** focus group hosted by Pearson (May 2012), Wiley Faculty Network internet based virtual seminar, October 2013
- *Ad hoc referee*: **Journal of Financial Research, Journal of Accounting and Public Policy**
- *Chapter contributor*: **Financial Institutions, Markets, and Money** by Kidwell, Blackwell, Whidbee, and Sias (Wiley)
- *Invited reviewer*: **Mastering the Fundamentals of Finance: Building Skills and Intuition** (2nd edition) by Larry Gorman (Cognella)
- *Invited reviewer*: **Fundamentals of Corporate Finance** (2nd edition) by Berk, DeMarzo and Harford (Prentice Hall)
- *Evaluator*: A new version of the **MyFinanceLab**, an online tutorial and homework system by Pearson
- *Proofreader*: **International Financial Management** (1st edition) by Eun and Resnick (McGraw-Hill)

ACADEMIC CONFERENCES AND PRESENTATIONS

Invited conference presentations

The Washington Area Finance Association annual conference, The Financial Management Association annual meeting, The Southern Finance Association annual meeting, The Twentieth Annual Faculty Research Forum of the Washington Consortium of Business Schools, The European Financial Management Association Conference

Roundtables and conference discussions:

The European Financial Management Association Conference, The Financial Management Association annual conferences, The Frank Batten Young Scholars Conference in Finance at the College of William and Mary, Transatlantic Roundtable on Financial and Monetary Affairs (organized by the European Institute and European Commission in Washington, D.C.), International Accounting seminars, FDIB (Faculty Development in International Business) program at University of South Carolina