

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 Undergraduate Studies, August 2017 – Present

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, Finance Society, Fall 2015 – Fall 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-level students
 - Membership grew from <10 to 700+ in 5 years
- Recipient (statewide), “Teachers Who Made a Difference”, 2015, 2016, 2017, 2018, 2019, 2020
- Recipient, Mentor of the Week, University of Kentucky, 2017
- Nominee, Ken Freedman Outstanding Faculty Advisor Award, University of Kentucky, 2017
- Recipient, Teaching Innovation Mini Grants, Gatton College, Fall 2017 & Spring 2018
- Recipient, Gatton College Teaching Innovation Proposal Grant, Summer 2016
- Nominee, "Inspirational Women of Gatton" award, University of Kentucky, 2014 & 2015
- Nominee, Teacher–Scholar Award, Texas A&M University, 2012
- Recipient, Lockheed Martin Aeronautics Company Excellence in Teaching Award, Mays Business School, Texas A&M University, 2013
- Mays Summer Teaching Grant, Texas A&M University, 2012 & 2013

ADMINISTRATIVE AND EXPERIENTAIL LEARNING EXPERIENCE

University of Kentucky:

- Director, Undergraduate Studies in Finance, Fall 2017– 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 accelerated curriculum and exclusive co-curriculum
 - Recruited and coached 20+ freshmen annually since Fall 2019
 - Provided training workshops, organized networking meetings
 - Raised \$20,000+ and obtained other support for scholarships and career development funding
 - Launched the UK Finance Alumni Network (UKFAN) consisted of 30+ recent finance alumni and assisted in forming the Finance Advisory Board of 12+ senior industry leaders to mentor finance scholars and other students pursuing finance careers
- Organizer, 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
 - Coached 10-16 scholarship recipients annually through graduation in career development
- 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 ~400 registrants in the past four years
 - Created 100+ recruiting relationships/partnerships and helped dozens of students obtain internships and full-time positions in financial services firms such as Goldman Sachs, JPMorgan, Bank of America
 - Reviewed and edited hundreds of resumes
 - Coached and provided career advice to hundreds of undergraduate and graduate (MSF) students
 - Collaborated with the University and College career offices to foster recruiting opportunities and organize on-campus recruiting meetings
- Organizer, University of Kentucky Stock Pitch Competition, Spring 2018 – Present
 - 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
- 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
- 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, Selection Panel for the University of Kentucky Outstanding Teaching Award, Spring 2019
- Member, Gaines Fellows Thesis Committee for Hadeel Abdallah (2019 Rhodes Scholar), Fall 2019
- 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 Master of Science in Finance, Gatton College, 2017 – Present

- Member, Faculty Merit Review Committee, Department of Finance and Quantitative Methods, 2017
- Faculty Advisor, Finance Society, Fall 2015 – Fall 2020
- 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
- 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
- Judge (Invited), Von Allman Center Entrepreneurs Bootcamp Pitch Competition, Fall 2018
- Judge (1 of 3), University of Kentucky Homecoming Royalty Interviews, 2015

Texas A&M University:

- 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
- *Ex-officio* Committee Chair, Professional Program of Accounting, Master of Science 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 presentation, 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
- Continuing Professional Education, Lone Star Research Conference, Department of Accounting, Mays Business School, Texas A&M University, 2013
- Invited speaker, Biotechnology Industry Advisory Council Student Development Conference, Texas A&M University, 2012

TEACHING EXPERIENCE

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

- Introductory Corporate Finance (undergraduate level; 400-500 students/session; 800-1,000+ annually)
- Intermediate Corporate Finance (undergraduate level, case studies)
- CFA Level I Exam Fundamentals (undergraduate and Master of Science in Finance)
- Careers in Finance (undergraduate level)
- Careers in Finance workshop (Master of Science in Finance)
- International Finance (undergraduate level)
- Experiential Learning (55 undergraduate Internship courses), Fall 2014 – Summer 2017
- Independent Studies/Research (undergraduate level), Fall 2015 – Present
- Pelissier Scholars Wall Street Visits (2017 – 2019; visits to 15+ firms during each week-long visit)
- **Selected Invited Speeches:** UK Alumni Association 2020 Financial Wellness Webinar (400+ views), 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

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)

SELECTED PUBLICATIONS

- "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.

OTHER PROFESSIONAL ACTIVITIES

Invited participant (1 of 12 nationwide): **McGraw–Hill Corporate Finance Summit**, March 2018

Invited reviewer: **Corporate Finance** by Pearson PLC, 2018

Reviewer: **PNC University of Kentucky Finance Conference**, 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

Member: **Financial Executive International**, 2016 & 2017

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

Proof–reader: **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