TIMOTHY B. MICHAEL

michael@uhcl.edu

University of Houston-Clear Lake
College of Business
2700 Bay Area Boulevard MC 204
Houston, Texas 77058
(281) 283-3193 (office)

AREAS OF INTEREST

Teaching:	Corporate Finance, Banking & Financial Markets
Research:	Corporate Finance, Fixed-Income Securities, Markets and Institutions

EDUCATION

University of South Carolina	PhD, Finance	2003
University of North Carolina at Charlotte	MBA	1992
University of North Carolina at Charlotte	BA, Finance	1989

DISSERTATION

"Convertible bond calls revisited: An examination of the wealth transfer motive for call policy," Supervised by Steven V. Mann.

ACADEMIC EXPERIENCE

University of Houston - Clear Lake	Associate Professor	9/11 - Present
	Assistant Professor	8/04 - 8/11

Economics, Finance, Marketing & Decision Sciences - College of Business

I teach the MBA Financial Policy course (graduate requirement) and as well as Contemporary Financial Institutions (undergraduate and graduate major requirement), the MS Finance capstone Seminar in Finance, Financial Statement Analysis (major requirement, both levels) and Business Finance (undergraduate core requirement).

James Madison University	Assistant Professor	2001-2004

Finance & Business Law Program
College of Business Administration

I was responsible for the Money & Capital Markets course (a junior-level major requirement) and Commercial Banking (a senior-level finance elective). I left JMU after a successful 3rd Year Review for family reasons.

The University of South Carolina Instructor 1997-2001

Banking, Finance, Insurance and Real Estate Program, Darla Moore School of Business

I taught Commercial Bank Practice & Policy (senior-level major requirement), Introduction to Real Estate (elective), Introduction to Finance (college requirement), and Commercial and Central Banking (elective; the college's money and banking course).

University of North Carolina at Charlotte Lecturer 1992-1994
Instructor Spring 1992

Department of Finance and Business Law

I taught Introduction to Corporate Finance (college requirement), Financial Institutions (senior-level major requirement), Financial Analysis (major requirement) and Personal Finance (college elective). I was responsible for developing and implementing a standard introductory corporate finance curriculum for the business core.

Rowan-Cabarrus Community College Part-time Instructor 1990-1992

I taught Microeconomics, Macroeconomics, Business Law I and II, and Corp. Finance II.

BUSINESS EXPERIENCE

Simplified Computer Systems, Incorporated June 1991-May 1992
General Manager

I supervised the operations and finances of a small value-added reseller of customized computers and Novell networks.

Cauble and Company of Carolina, Mortgage Bankers 1990-1995
Financial Analyst and Computer Systems Consultant

I provided analysis and opinion for lending decisions up to $25 million.

REFEREED PUBLICATIONS

"Marriott International, Incorporated: Capital structure & financing decisions amid the COVID-19 crisis in Spring 2020." (2021). With Helen Saar. *Journal of Finance Case Research*. Vol. 19, No 1, pages 57-80. Issued in 2021.

"A primer on the causes and consequences of the (continuing) financial crisis." (2021). with Melissa Williams. *Journal of Finance Case Research*. Vol. 19, No. 2, pages 53-64. Issued in 2021.

"Finance in the Cinema: A survey of professor ratings of movies for finance students." (2020). with G. Kester, *Advances in Financial Education*, Summer 2020, pages 78-98. *Printed Fall 2021*.

"Case research, writing, publication and use." (2019). With R. Stretcher, *Journal of Financial Education*, Vol. 45, No. 2, Winter, pages 321-334. *Printed Spring 2021.*

"Recommended books for finance students: An annotated bibliography and professor ratings." (2019). with G. Kester, *Journal of Financial Education*, Vol. 45, No. 1, Spring, pages 72-81. *Printed Summer 2020.*

"Real world engagement: Collegial community impact." (2017) with C. Crawford, *Academic Exchange Quarterly*, Vol. 21, No. 3, pages 44-50.

"Bayou U.: Ethics and leadership," (2014) with M. Williams, *Journal of Finance Case Research*, Vol. 16, No. 1, pages 63-73.

"Teaching ethical decision making with familiar situations," (2014) with M. Williams, *Journal of Finance Case Research*, Vol. 16, No. 1, pages 99-111.

"Where are they now? An analysis of the life cycle of convertible bonds," (2013) with T. Korkeamaki, *Financial Review*, Vol. 48, No. 3, pages 489-509.

"Student equity: Discouraging cheating in online courses." (2013) with M. Williams, *Administrative Issues Journal*, Vol. 3, No. 2, pages 32-43.

"Reverse convertibles prices: Evidence from secondary market trading." (2013) with I. Pavlova, S. Cotten and J. Whitworth. *Business Studies Journal*, Vol. 5, Special Issue 1, pages 9-18.

"The VW market squeeze: A lesson for short sellers," (2013) with I. Pavlova, *Journal of Finance Case Research*, Vol. 14, pages 11-22.

"JackieFashion, Inc." (2013) with R. Stretcher and M. Funck, *Journal of Finance Case Research*, Vol. 14.

.

"Retirement under uncertainty: Using Excel to enhance financial planning instruction," (2012), with S. Cotten, I. Pavlova and J. Whitworth, *Advances in Financial Education* Vol. 10, No. 1 & 2, pages 85-94.

"Columns besieged." (2012), with T. Voelker, K. Wooten, and R. McGlashan, *Case Research Journal*, Vol. 32, No. 2 (Spring), pages 123-133.

"Teaching asymmetric information: Lessons from the 2008 financial crisis," with I. Pavlova and S. Cotten (2011). *Business Studies Journal*, Vol. 3, Special Issue Number 2, pages 77-96.

"Dividend policy at Tennessee Publishers, Inc." with Robert Stretcher (2009). *Journal of Finance Case Research*, Vol. 10, No. 2, pages 117-120.

"How defined benefit pension assets affect the returns and volatility of the sponsor's stock." (2008). with S. Marshall, D. Maloney and F. Damanpour. *International Journal of Banking and Finance*, Vol. 5, No. 2, pages 87-100.

"Bank mergers, equity risk incentives, and CEO stock options." (2008). with M. Williams and R. P. Rao. *Managerial Finance*, Vol. 34, No. 5, pages 316-327.

"Managerial incentives and acquisitions: A survey of the literature." (2008). with M. Williams and E. Waller (2008). *Managerial Finance*, Vol. 34, No. 5, pages 328-341.

"Using the case method to teach finance: Challenges and opportunities." (2006), with G. Kester, E. McGoun, and B. H. Nunnally, Jr. *Journal of the Academy of Business Education*, Vol. 7.

"Hillfolk Crafts, Incorporated," (2003) with M. Williams, *Journal of Finance Case Research*, Vol. 5, pages 29-35.

"Modern Investments, Incorporated," (2001) with Bennie H. Nunnally, Jr., *Journal of Finance Case Research*, Vol. 2, No. 2 (Spring), pages 9-17.

PROFESSIONAL PUBLICATIONS

Letter to the Editor "The survey course and the decline of teaching," *The Wall Street Journal*, November 29, 2022.

Letter to the Editor regarding the student loan monopoly, "Think Twice Before Taking Large Student Loans," *The Wall Street Journal*, December 15, 2021.

Letter to the Editor regarding proposed changes in tax law on capital gains, "Iowa Farm Bureau Responds to Ag Secretary," *The Wall Street Journal*, September 16, 2021.

Letter to the Editor "MBAs still have their virtues for many,", *The Wall Street Journal*, September 27, 2019, page A15.

Letter to the Editor regarding “Free college makes sense for those qualified,” *The Wall Street Journal*, December 13, 2019, page A17.

Letter to the Editor regarding online instruction and university resources, *The Wall Street Journal*, September 5th, 2014, page A17.

Authored *Instructor's Manual with Solutions* for *Capital Markets: Institutions and Instruments (3rd Edition)* by Frank J. Fabozzi and Franco M. Modigliani, Prentice-Hall International, 2003.

Review of *Principles of Corporate Finance*, by Haim Levy, *Journal of Financial Education*, Spring 1999, pages 92-95.

Changes in South Carolina Real Estate Law in the Center for Applied Real Estate Education and Research (CAREER) News, The University of South Carolina, Vol. 1 Issue 1, August 1997.

"Personal Computers Incorporated" in Bennie H. Nunnally, Jr. and D. Anthony Plath, *Cases in Finance, Second Edition*, (Homewood, Illinois: Richard D. Irwin), 1996. [also in 1st edition]

"Village Plaza Shopping Center" in Bennie H. Nunnally, Jr. and D. Anthony Plath, *Cases in Finance, Second Edition*, (Homewood, Il.: Richard D. Irwin), 1996. [also in 1st edition]

BOOKS AND BOOK CHAPTERS

T. Michael and M. Williams (2021) “Chapter 8: Bandwidth and Online Course Design and a Primer for Online Development,” In C. Crawford and M. Simmons (Eds), eLearning Engagement in a Transformative Social Learning Environment (pp. 157 – 178), IGI Global, DOI :10.4018/978-1-7998-6956-6.CH008.

T. Michael and M. Williams. (2021) “Chapter 3: Pwning Noobs for Fun and Profit: eSports and Entrepreneurship,” In S. Andrews and C. Crawford (Eds), Handbook of Research on Pathways and Opportunities Into the Business of eSports (pp. 47 – 66), IGI Global, DOI: 10.4018/978-1-7998-7300-6.ch003.

S. Andrews, T. Michael, M. Williams, L. Lacher, and C. Crawford. (2021) “Chapter 8: Impact of eSports Upon Higher Education from a Faculty Perspective: Transformational Pathways and Opportunities,” In S. Andrews and C. Crawford (Eds), Handbook of Research on Pathways and Opportunities Into the Business of eSports (pp. 149 - 178), IGI Global, DOI: 10.4018/978-1-7998-7300-6.ch008.

Robert H. Stretcher, III, and Timothy B. Michael. (2005). *Cases in Financial Management*, (Upper Saddle River, N.J.: Pearson Prentice Hall). ISBN 0-13-148343-9. All of these cases were also made available for adoption through Prentice Hall Custom Publishing.

PROFESSIONAL PRESENTATIONS

"Panel Session: Meet the Editors," with Rich Fendler, Milind Shrikhande, and Mandy Duan at the Financial Education Association annual meeting, September 2022. This was hosted on-site in San Antonio.

"Panel Session and Workshop: Case Method and Case Teaching," with Bennie H. Nunnally, Jr., George W. Kester, Melissa Williams and Robert Stretcher at the Financial Education Association annual meeting, September 2022. This was hosted on-site in San Antonio.

"A Survey of Faculty Views on the Case Method of Teaching Finance" with George Kester and Ben Nunnally, at the Financial Education Association annual meeting, September 2022. This was hosted on-site in San Antonio.

"Panel Discussion: 2021 Finance Teaching Workshop," for the British Academy of Management, July 2021, with Renee Adams, Douglas Cumming, Vivine Cameron, Gbenga Ibikunie and Larisa Yarovaya. Hosted by Raphael Markellos of UEA. This session was hosted virtually due to the pandemic.

"Meet the Editors," with Rich Fendler, Milind Shrikhande and Stuart Michelson, at the Financial Education Association annual meeting, September 2021. This session was hosted virtually due to the pandemic.

"Panel Session: Online Instruction During the Pandemic," with Howard Keen, Melissa A. Williams and Steven Pilloff at the Financial Education Association annual meeting, September 2021. This session was hosted virtually due to the pandemic.

"Panel Session: Case Method and Case Teaching," with Bennie H. Nunnally, Jr., George W. Kester and Helen Saar at the Financial Education Association annual meeting, September 2021. This panel was hosted virtually due to the pandemic.

"Panel: Meet the Editors," presented with Richard Fendler, Milind Shrikhande, Stuart Michelson, and Robert Stretcher, at the Financial Education Association annual meeting, September 2020.

"Case study: Capital structure & financing decisions at Marriott International amid the COVID-19 crisis in Spring 2020," presented with Helen Saar at the Financial Education Association annual meeting, September 2020.

"Roundtable: Assessment in an online environment," with Howard Keen, Melissa A. Williams and Steven Pilloff at the Financial Education Association annual meeting, September 2020.

"Workshop: Online teaching – quality and integrity," presented with Melissa A. Williams and Joann Frederickson at the Financial Education Association annual meeting, September 2020.

"Panel: Teaching with Cases," panel and workshop session with Bennie H. Nunnally, Jr. and George W. Kester at the Financial Education Association annual meeting, September 2020.

"Panel: Writing and Publishing Cases," panel and workshop session with Bennie H. Nunnally, Jr. and Melissa A. Williams at the Financial Education Association annual meeting, September 2020.

"Student Preparedness and Student-Centered Learning," panel session with Steven J. Pilloff, presented at the Financial Education Association annual meeting, Savannah, September 2019.

"Online Teaching: Logic and Lessons" panel and workshop session at the Financial Education Association annual meeting, Savannah, September 2019.

"Meet the Editors," panel session with Richard Fendler, Stuart Michelson, and Robert Stretcher, presented at the Financial Education Association annual meeting, Savannah, September 2019.

"Student Preparedness, Student-Centered Learning" panel session with Steven J. Pilloff, presented at the Financial Education Association annual meeting, San Antonio, September 2018.

"Online Teaching: An Introduction" prepared with Melissa Williams, presented at the Financial Education Association annual meeting, San Antonio, September 2018.

"Meet the Editors," panel session with Richard Fendler, Stuart Michelson, and Robert Stretcher, presented at the Financial Education Association annual meeting, San Antonio, September 2018.

"Ethics in the Finance Curriculum," panel with George Kester and Bennie Nunnally, presented at the Financial Education Association annual meeting, San Antonio, September 2018.

"Finance in the Cinema: A Survey of Professor Ratings of Movies for Finance Students" with George Kester, for presentation at the annual meeting of the Financial Education Association, presented at Academy of Economics & Finance, February 2018, Houston.

"Recommended Books for Finance Students: An Annotated Bibliography and Professor Ratings," with George Kester, September 2016, at the Financial Education Association annual meeting, Fort Lauderdale.

"Teaching and Learning with Cases in Finance," with George Kester, Mary Funck and Robert Stretcher, September 2016, at the Financial Education Association annual meeting, Fort Lauderdale.

"Meet the Editors," on behalf of *Journal of Finance Case Research*, September 2016, at the Financial Education Association annual meeting, Fort Lauderdale.

"Writing and publishing cases in finance," with R. Stretcher, North American Case Research Association (NACRA) annual meeting, Austin, October 2014.

“Writing and publishing cases in finance,” with R. Stretcher, Financial Education Association annual meeting, Savannah, September 2014.

“Student bandwidth and online course design in finance,” with M. Williams, Financial Education Association annual meeting, Savannah, September 2014.

“Multi-faceted approaches to teaching business ethics,” panel session with S. Clinebell and A. Alexander, Financial Education Association annual meeting, Savannah, September 2014.

“Ethics and leadership: A case analysis of a business school,” with M. Williams, Financial Education Association annual meeting, Savannah, September 2014.

“JackieFashion, Inc.” with R. Stretcher and M. Funck, Financial Education Association annual conference, Bermuda, September 2013.

"Reverse convertibles prices: Evidence from secondary market trading." with I. Pavlova, S. Cotten and J. Whitworth, Sam Houston State University General Business Conference, April 2013.

“Student equity: Discouraging cheating in online courses.” with M. Williams. Sam Houston State University General Business Conference, April 2013.

“Undergraduate students writing about finance: Preparation and assessment.” with M. Williams. Sam Houston State University General Business Conference, April 2013.

"Retirement under uncertainty: Using Excel to enhance financial planning instruction," with S. Cotten, I. Pavlova and J. Whitworth, presented at the Financial Education Association annual meeting, September 2012 (Charleston).

“Student equity: Techniques for discouraging online cheating,” with Melissa A. Williams, presented at the Financial Education Association annual meeting, September 2011 (Orlando).

“Student equity: Techniques to discourage cheating in online courses,” presentation to University of Houston-Clear Lake Teaching-Learning Enhancement Center (TLEC), April 7, 2011.

“Teaching asymmetric information: Lessons from the 2008 financial crisis,” with I. Pavlova and S. Cotten, presented at the Sam Houston State University General Business Conference, April 15th 2011.

"Where are they now? An analysis of the life cycle of convertible bonds," with Timo Korkeamaki, presented at the Southwestern Finance Association annual meeting 2011 (Houston).

Panel session participant, Ethics in the Finance Curriculum, Financial Education Association annual meeting (Orlando), September 2011.

“Improving coverage of asymmetric information issues: Lessons from the 2008-2009 crisis,” with Stephen Cotten and Ivelina Pavlova, presented at the Financial Education Association annual conference 2010 (San Antonio).

"Undergraduate students writing about finance: Preparation & assessment," presented at the Financial Education Association annual conference 2010 (San Antonio).

"Developing Online Programs in Finance: Considerations and challenges," with Melissa A. Williams, presented at the Financial Education Association annual conference 2010 (San Antonio).

“Pension-asset returns and pay for performance sensitivity,” with Melissa A. Williams and S. Brooks Marshall, presented at the Southwestern Finance Association annual meeting 2010 (Dallas).

“The Porsche Gamble: Hedge funds lost, but did shareholders win?” with Ivelina Pavlova, presented at the annual conference of the Financial Education Association, Fort Lauderdale, Florida, September 23, 2009.

“The Life and Death of Hard Rock Park,” with Ed Waller, presented at the annual conference of the Financial Education Association, Fort Lauderdale, Florida, September 23, 2009.

“Mark Cuban, Insider Trading, and PIPEs,” with Ed Waller, presented at the annual conference of the Financial Education Association, Fort Lauderdale, September 23, 2009.

"Making the case for cases in finance: Issues in case teaching for business," Southwestern Business Administration Teaching Conference, October 2008, Texas Southern University.

"Managerial incentives and acquisitions: A survey of the literature," with Melissa Williams and Ed Waller, Southwestern Finance Association annual meeting (Houston) March 2008.

"Dividend policy at Tennessee Publishers, Inc." with Robert Stretcher, Midwest Finance Association annual meeting (San Antonio) February 2008.

"How defined benefit pension assets affect the returns and volatility of the sponsor’s stock" with Brooks Marshall, David Maloney and Faramarz Damanpour, presented at Southwestern Finance Association annual meeting (San Diego), March 2007.

“The influence of SEC Rule 144A on new issue bond yields,” with Melissa A. Williams, presented at Southwestern Finance Association annual meeting (San Diego), March 2007.

“Managerial incentives and acquisitions: A survey of the literature,” with Ed Waller and Melissa Williams, presented at the Eastern Finance Association annual meeting (Philadelphia), April 2006.

“Using the case method to teach finance: Challenges and opportunities,” with George W. Kester, Elton G. McGoun and Ben Nunnally, Financial Education Association annual conference (San Antonio), April 2006.

"Teaching for teaching professionals: Navigating the evaluation maze," with Robert Stretcher, workshop presented at the Academy of Economics and Finance annual meeting (Houston), February 2006.

"Enhanced gaming system introduction (forecasting case)," with Melissa A. Williams, presented at Academy of Economics and Finance (Houston), February 2006.

"A summer project (entrepreneurship case)," with Edward R. Waller, presented at Academy of Economics and Finance (Houston), February 2006.

"Yield discounts on new issue convertible bonds," with Melissa A. Williams, presented at Southwestern Finance Association, Dallas (March), 2005.

"The impact of terrorism insurance legislation on insurance company and commercial bank returns: Does type of insurance matter?" with Tammy Rogers and Melissa A. Williams, presented at Southwestern Finance Association (Dallas), March 2005.

"The generalizability of bankruptcy models over time," with Melissa A. Williams and Tammy Rogers, presented at the Southwestern Finance Association annual meeting (Orlando), March 2004.

"An examination of new issue convertible bond yields," presented at the Southeast Decision Sciences annual meeting (Hilton Head), February 2002.

"Risk analysis and capital budgeting practices: A survey of the *Fortune* 1000," with Bennie H. Nunnally, Jr., presented at the annual meeting of the Financial Management Association (Seattle), October 2000.

"Risk considerations in capital budgeting practices for the new millennium: A *Fortune* 1000 Survey," with Bennie H. Nunnally, Jr., presented at the 36th annual meeting of the Eastern Finance Association (Myrtle Beach), April 2000.

PROCEEDINGS PAPERS

“Finance in the Cinema: A Survey of Professor Ratings of Movies for Finance Students” with George Kester, published in *Academy of Economics and Finance Papers and Proceedings*, Fifty-fourth Annual Meeting, Volume 42, 2018, pp. 7-22.

“Recommended Books for Finance Students: An Annotated Bibliography and Professor Ratings,” with George Kester, 2016, published in the proceedings of the Financial Education Association annual meeting, Fort Lauderdale. Won sole “Honorable Mention” after doubleblind peer review process for annual conference Best Paper awards.

“Teaching and Learning with Cases in Finance,” with George Kester, Mary Funck and Robert Stretcher, 2016, published in the proceedings of the Financial Education Association annual meeting, Fort Lauderdale.

"How defined benefit pension assets affect the returns and volatility of the sponsor’s stock," with Brooks Marshall, David Maloney and Faramarz Damanpour, 2007, published in the proceedings of the Southwestern Finance Association annual meeting, San Diego.

"An examination of new issue convertible bond yields," 2002, published in the proceedings of the annual Southeast Decision Sciences meeting, Hilton Head.

THESIS SUPERVISION

The determinants of underwriter reputation, by Eyyub Yunus Kibis, B.S. M.A., Spring 2013.

WORKING PAPERS

“Biases in Online Course Evaluations,” with Faiza Zalila and Melissa A. Williams.

"Undergraduate students writing about finance: Preparation and assessment," with Melissa A. Williams.

"Student bandwidth and online course design in finance," with Melissa A. Williams.

"A primer on the causes & consequences of the continuing financial crisis."

“The Life and Death of Hard Rock Park.”

“Mark Cuban, Insider Trading and PIPEs.”

"Making the case for cases in finance: Issues in case teaching for business."

OTHER PROJECTS FOR PUBLICATION

“Ethics resources for graduate students: Paving the way for self-reflection” with F. Zalila and Melissa A. Williams.

“Readings in case teaching and learning” with G. Kester, Washington & Lee University, and Bennie H. Nunnally, Jr. the University of North Carolina at Charlotte.

“Abusive supervision and organizational performance,” with Melissa A. Williams.

“Pension-asset returns and pay for performance sensitivity,” with Melissa A. Williams and S. Brooks Marshall.

"Wal-Mart and the financial services industry," with Melissa A. Williams.

“The influence of SEC Rule 144A on new issue bond yields,” with Melissa A. Williams.

"Yield discounts on new issue convertible bonds," with Melissa A. Williams.

"The impact of terrorism insurance legislation on insurance company and commercial bank returns: Does type of insurance matter?" with Tammy Rogers and Melissa A. Williams.

“Managerial risk aversion and net core return,” with Melissa A. Williams and S. Brooks Marshall.

"Fannie, Freddie, and Regulatory Arbitrage of the Basel Agreement."

“Light pollution and real estate valuation.”

"The challenges facing Millennial students in business."

"Calls of convertible bonds: New evidence regarding the wealth transfer hypothesis," with Steven V. Mann and William T. Moore.

"Convertible bond use and firm risk"

"Pawn shops and collateralized consumer lending: A foundation for analysis"

AWARDS, GRANTS AND OTHER RECOGNITION

Selected by Chartered Financial Analysts International (CFAI) for presentation of “Recommended books for finance students” with George Kester for CFAI Newsletter, Spring 2021.

Selected by Chartered Financial Analysts International (CFAI) for presentation of “Finance in the cinema” with George Kester for CFAI Newsletter, Fall 2020.

Distinguished Service Award, September 2018, Institute of Finance Case Research.

Awarded sole “Honorable Mention” recognition as Best Pedagogical Paper for “Recommended Books for Finance Students: An Annotated Bibliography and Professor Ratings,” with George Kester, 2016, at the annual conference and was published in the proceedings of the Financial Education Association (FEA) annual meeting, Fort Lauderdale.

"Retirement under uncertainty: Using Excel to enhance financial planning instruction," with S. Cotten, I. Pavlova and J. Whitworth, Best Educational Pedagogy Paper, Financial Education Association annual conference, September 2012.

Invited to present "Tips and Tricks for Online Course Development," written with Melissa A. Williams, at the UHCL Digital Academy II, September 2011.

Selected from national pool to participate as lead finance case author in a 2009 North American Case Research Association grant project "360° Analysis of an Organization." [This role was declined due to prior obligations and family commitments.]

Invited to join Phi Kappa Phi International Honor Society at UH-Clear Lake in 2009.

Spring 2007 inductee of Beta Gamma Sigma National Honor Society, UH-Clear Lake.

Distinguished Service Award, March 2008, Institute of Finance Case Research.

Best paper in Finance & Economics Track, Southeast Decision Sciences annual meeting, Hilton Head, South Carolina, February 2002.

Recipient of The Darla Moore School of Business Outstanding Graduate Student Teaching Award for the 2000-2001 school year.

1999-2000 Gamecock Faculty All-Star, awarded by the University Athletics Advisory Committee at The University of South Carolina for "outstanding efforts on behalf of our student-athletes," March 24, 2000.

Nominated by the Banking, Finance, Insurance and Real Estate program for the USC Outstanding Graduate Student Teaching Award, 2000-2001.

Summer Teaching Grant, 2004, James Madison University. Funding received for "Implementing a Professional Bank Simulation in FIN 460 (Commercial Bank Management)."

Center for Instructional Technology (CIT) Grant, 2001-2002, James Madison University. Funding received to provide an electronic (CD-ROM) reading list for all students in FIN 460 (Commercial Banking).

PROFESSIONAL SERVICE

Consulting reviewer for *Sage Business Cases*, 2017 to present.

Executive Director, Financial Education Association, Fall 2014 to present.

Program committee, Financial Education Association annual meeting 2019-2023

Publisher, *Journal of Financial Education* and *Advances in Financial Education*, Fall 2015 to present.

Editor, *Journal of Finance Case Research*, Summer 2004 to Spring 2009, September 2013 to present. I was a reviewer for *Journal of Finance Case Research* beginning in the Fall of 2000, and associate editor during 2003-2004.

Reviewer for *Journal of Financial Education* and *Advances in Financial Education*, June 2008 to present.

Presentation for "Faculty Development Day," UHCL Center for Faculty Development, March 22, 2019.

Represented UHCL College of Business, Finance program, at the annual Financial Executives International (FEI) awards banquet, February 2019.

Program committee, Eastern Finance Association annual meeting 2019.

Program committee, Southern Finance Association annual meeting 2019.

Reviewer for *Administrative Issues Journal*, September 2010 to present.

Reviewer for NACRA *Case Research Journal*, September 2009 to present.

Reviewer for *Managerial Finance*, December 2010 to present.

Reviewer for Peter Rose and Sylvia Hudgins. *Bank Management & Financial Services, 8th Edition.* McGraw-Hill:USA, 2010.

Consulting reviewer for Jonathan Berk and Peter DeMarzo, *Corporate Finance*, all editions, Pearson-Prentice Hall.

Consulting reviewer for Kenneth A. Kim and John R. Nofsinger, *Corporate Governance*, first and second editions, Pearson-Prentice Hall.

Board of Directors member, Southwestern Finance Association, 2006-2008. Nominated again in 2010.

Program committee, Financial Education Association annual meeting 2017 (Savannah, cancelled due to Hurricane Irma)

Program & Awards committees, Financial Education Association annual meeting 2016 (Fort Lauderdale).

Program & Awards committees, Financial Education Association annual meeting 2015 (San Antonio).

Program & Awards committees, Financial Education Association annual meeting 2014 (Savannah).

Program committee, Eastern Finance Association annual meeting 2013.

Program committee, Southern Finance Association annual meeting 2013.

Program committee, Financial Education Association annual meeting 2013 (Charleston).

Program & Awards committees, Southwestern Finance Association annual meeting 2013 (Albuquerque).

Program committee, Financial Management Association annual meeting 2012.

Program committee, Financial Education Association annual meeting 2012 (Bermuda).

Program committee, Southwestern Finance Association annual meeting 2012 (New Orleans).

Program committee, session chair, Financial Education Association annual meeting 2011 (Orlando).

Program committee, session chair (2 sessions) and discussant (1 paper), Southwestern Finance Association annual meeting 2011 (Houston).

Program committee, Financial Management Association annual meeting 2011 (Denver).

Program committee, Financial Education Association annual meeting 2010 (San Antonio).

Program committee, session chair and discussant (1 paper), Southwestern Finance Association annual meeting 2010 (Dallas).

Program committee, Southern Finance Association annual meeting 2010 (Asheville).

Program committee, Financial Management Association annual meeting 2010 (New York).

Program committee, Eastern Finance Association 2010 annual meeting (Miami).

Program committee Southwestern Finance Association annual meeting 2009 (Oklahoma City).

Program committee, session chair and discussant, Southwestern Finance Association annual meeting 2008 (Houston).

Program committee, Southwestern Finance Association 2007 annual meeting (San Diego).

Served as content editor for the chapter "Capital Budgeting" for *The Handbook of Technology Management* (John Wiley), Summer 2008.

Program committee, Financial Management Association 2008 national meeting (Grapevine).

Program committee, Financial Management Association 2007 national meeting (Orlando), 8 papers reviewed.

Session chair (2 sessions), Financial Education Association annual meeting, Fort Lauderdale, September 2009.

Discussant (1 paper) for the Financial Management Association annual meeting 2008 (Grapevine).

Discussant (1 paper) for the Financial Management Association annual meeting 2007.

Discussant (4 papers) and session chair (1 session) for Southwestern Finance Association annual meeting, 2007 (San Diego).

Midwest Finance Association 2008 regional meeting (San Antonio), co-ordinated case sessions for *Journal of Finance Case Research* sponsorship. Discussant for 1 paper.

Program committee member for the Financial Management Association annual meeting, Salt Lake City, 2006.

Discussant and track chair (one session) for the Financial Management Association annual meeting, Salt Lake City, 2006.

Workshop leader and discussant for the Academy of Finance and Economics annual meeting, Houston, February 2006.

Participant in case journal editor roundtable, Southwest Case Research Association annual meeting, Oklahoma City, March 2006.

Discussant for the Southwestern Finance Association annual meeting, Oklahoma City, March 2006.

Program committee member for Southwestern Finance Association annual meeting, 2006.

Best Paper award committee member for Southwestern Finance Association annual meeting, 2006.

Discussant for the Financial Management Association annual meeting, Chicago, October 2005.

Program committee member, session chair, and discussant for Southwestern Finance Association annual meeting in Dallas, Texas, March 2005.

Discussant (3 papers) for Southwestern Finance Association annual meeting in Orlando, Florida, March 2004.

Served on Jack Kent Cooke Scholarship committee for James Madison University during the 2003-2004 school year.

Program committee member and session chair for the Financial Management Association annual meeting, Denver, Colorado, October 2003.

Session chair and discussant for the Southeast Decision Science annual meeting, Hilton Head, South Carolina, February 2002. (chaired one session, discussed in two sessions)

Discussant (one paper) for the 2001 Eastern Financial Association meeting in Charleston, South Carolina, April 26-27, 2001.

OTHER ACTIVITIES

Developed MS Finance and BS Finance program reviews during 2022 (with Dr. Melissa Williams)

Member of University-level committee for developing peer review of teaching standards, FY19 to the present.

Chair of Peer Review of Teaching committee, College of Business, 2019-2021.

Chair of Planning & Budgeting Committee, UHCL Shared Governance, FY2010-FY2013, and again for FY2016-FY2018 and FY19-FY20. Committee member in other years.

Co-Chair, UHCL Budget Task Force, 2018-present.

Committee member for BUS, UHCL Faculty Research Support Fund (FRSF) Committee, 2008-present.

Co-advisor for the FMA National Honor Society at UHCL, 2006 to present.

Co-lead for pilot study for proctoring in online courses, School of Business, 2013-2014. Developed resources for other BUS faculty, 2013-present.

Committee member (senator), UHCL Faculty Senate, 2006-2008, 2010-present, served on Curriculum & Teaching, Curriculum (current) and Budget committees.

Chair, UHCL Ad Hoc Committee on Online Assessment and Proctoring, Fall 2015 to 2018, committee member Fall 2011 to Fall 2015.

Committee member, Ad Hoc Committee on Faculty Workload, 2013 to 2017.

Grievance panel member for university (elected by school), 2011 to present.

Committee member for BUS, UHCL Four-Year Initiative Financial Resources Committee, Spring 2012 through 2015.

Committee member, UHCL Shared Governance, 2006-2008 and 2010-2012, served on Facilities & Support Services Committee (FSSC) as well as Planning & Budgeting (PBC).

Committee member, School of Business MBA Committee, Fall 2012–Spring 2014. Committee was disbanded at the end of Spring 2014.

Faculty advisor for the student chapter of the Financial Management Association, James Madison University, 2002-2004.

Faculty advisor for Phi Chi Theta professional business fraternity, James Madison University, 2003-2004.

Reviewed *Foundations of Financial Institutions and Markets* (2003) by Rose for McGraw-Hill.

Reviewed draft manuscript chapters for *Principles of Cash Flow Valuation* (2002) by Tham and Velez-Pareja for Academic Press - Elsevier Science.

Administered ABA BankSim (strategic simulation) for the South Carolina Bankers' Association annual school at The University of South Carolina, 1999-2001.

Served as proofreader and content analyst for both editions of *Cases in Finance* by Nunnally & Plath.

With Philip C. English, II, presented "The Stanford Bank Game for Lithuanian Bankers" for The Daniel Management Center at The University of South Carolina, Fall 1996.

Presented "Capital Budgeting Analysis for Health Care Professionals" as instructor, a four-contact-hour session in the course "Public Budgeting and Finance" (MPAD 6131) for the Master of Public Administration program at the University of North Carolina at Charlotte, Summer 1993.