

V I T A

INDUDEEP S. CHHACHHI

PERSONAL DATA

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EDUCATION

D.B.A. August 1990. Southern Illinois University.
Major area: Finance. GPA: 4.0

M.B.A. August 1986. Southern Illinois University.
Major: Finance. GPA: 4.0

B.S. June 1983. Indian Institute of Technology.
Major: Chemical Engineering. Graduated with
Distinction (Honors)

EMPLOYMENT

Western Kentucky University
Professor of Finance, 7/08 - present
Leon Page Fellow of Finance, 1/23 – present
Director, TVA Investment Challenge Program, 7/05 – present
Hays Watkins Teaching Fellow
Director, Financial Planning Program, 7/09 – 6/11
Teaching responsibilities: Corporate Finance, Investments, Portfolio Management,
Behavioral Finance, and Insurance

Western Kentucky University
Chair, Department of Finance, 7/99 – 6/07 and 7/16 - present

EMPLOYMENT (continued)

Cerity Partners

Consultant, 01/23 – Present

Senior Financial Advisor (Principal), serve on Global Portfolio Models Sub-Committee, and Portfolio Manager for SWAN (ETF)

ARGI Financial Group

Consultant, 9/06 – 12/31/2022

Senior Financial Advisor, serve on the Investment Committee, Portfolio Manager for SWAN (ETF) and oversee Advanced Investment Strategies

Western Kentucky University

Associate Professor of Finance, 7/95 – 6/08

Teaching responsibilities: Corporate Finance, Investments, and Portfolio Management

Western Kentucky University

Assistant Professor of Finance, 7/90 - 6/95

Teaching responsibilities: Corporate Finance, Investments

Southern Illinois University

Teaching Assistant, Department of Finance, 1/89 - 5/90

Teaching responsibilities: Corporate Finance, Investments

Southern Illinois University

Research Assistant, Department of Finance, 6/87 - 12/88

Southern Illinois University

Lecturer, Department of Finance, 8/86 - 5/87

Teaching responsibilities: Corporate Finance, Investments

Southern Illinois University

Teaching Assistant, Department of Finance, 8/84 - 5/86

Oil & Natural Gas Commission, Ankleshwar, India

Assistant Executive Engineer, 7/83 - 7/84

Job responsibilities: Managing Central Oil Distribution Station

AWARDS & NOMINATIONS

1999 2nd place in TVA's ICP Competition (WKU)

2000-2001 **Outstanding MBA Teacher**

2003 Outstanding Performance Award in TVA's ICP Competition (WKU)

2004-2005 **Outstanding MBA Teacher**

2006-2007 **Don & Suzanne Vitale Award for Innovation, Initiative and Leadership**

May, 2007 Best Paper Award (Academic Business World International Conference)

AWARDS & NOMINATIONS (continued)

2007-2008	GFCB Best Teacher Award
2009	2 nd place in TVA's ICP Competition (WKU)
2010	Nominated for the GFCB Service Award
2010	3 rd place in TVA's Investment Challenge Competition (WKU)
2010-2011	Outstanding MBA Teacher
2011	Hays Watkins Teaching Fellow
2011	Nominated for Beta Gamma Sigma "Professor of the Year"
2012	CFA's Global Investment Research Challenge—team's written report ranked #1
2012	2 nd place in TVA's Investment Challenge Competition (WKU)
2014	Gordon & Glenda Ford Award of Faculty Excellence
2014	Nominated for the GFCB Service Award
2017	Nominated for the GFCB Teaching Award
2017	3 rd place in TVA's Investment Challenge Competition (WKU)
2018	Nominated for the GFCB Service Award
2020	Nominated for the WKU Spirit Award
2020	Nominated for UDP Award
2020	Outstanding MBA Teacher
2022	Vitale Award for Initiative, Innovation & Leadership
2022	5 th place in TVA's Investment Challenge Competition (WKU)
2023	Spirit of WKU Award

PROFESSIONAL ACTIVITIES

A. Refereed Articles in Journals

1. "Shareholder Returns for International Mergers in the U.S.," Managerial Finance, Vol. 15, No. 4 (1989), pp. 23-28, Ike Mathur, Indudeep Chhachhi and Sridhar Sundaram.
2. "Merger Synergy and the Relative Size of Bidders and Targets," The Journal of Midwest Finance, Vol. 20 (1991), pp. 1-11, Wallace Davidson, Louis Cheng and Indudeep S. Chhachhi.
3. "The Market Effects of Acquisition-Related Foreign Direct Investments in the U.S.," The North American Review of Economics and Finance, Vol. 3, No. 1 (1992), pp. 38-48, Ike Mathur, Nanda Rangan, Indudeep Chhachhi and Sridhar Sundaram.
4. "Financial Characteristics of Highly Profitable Small Kentucky Banks," Vol. 12 (1993), pp.25-34, Kentucky Journal of Economics and Business, Edward Wolfe, Samanta Thapa, and Indudeep S. Chhachhi.

A. Refereed Articles in Journals (continued)

5. “International Acquisitions in the United States: Evidence from Returns to Foreign Bidders,” Vol. 15, No. 2 (1994), pp. 107-118, Managerial and Decision Economics, Ike Mathur, Nanda Rangan, Indudeep S. Chhachhi, and Sridhar Sundaram.
6. “A Test for Price Pressure Effects in Tender Offer Stock Repurchases,” Vol. 31, No. 1 (1996), pp. 25-49, Financial Review, Wallace N. Davidson, Indudeep Chhachhi, and John Glascock.
7. “The Valuation Effects of the Mexican Debt Crisis: A Re-examination,” Vol. 7 (1997), pp. 97-106, Applied Financial Economics, Ike Mathur, Sridhar Sundaram, and Indudeep Chhachhi.
8. “Comparison of the Market Reaction to Specially Designated Dividends and Tender Offer Stock Repurchases,” Vol. 26, No. 3 (1997), pp. 89-96, Financial Management, Indudeep S. Chhachhi and Wallace N. Davidson.
9. “The Wealth Effects of Board Composition and Ownership Structure in International Acquisitions,” (2000), Advances in Financial Economics, Sridhar Sundaram and Indudeep Chhachhi.
10. “The Performance of Transfer versus ‘Native’ Students in Principles of Finance,” Vol. 31, Winter (2005), pp.50-63, Journal of Financial Education, Kam C. Chan, Connie Shum, and Indudeep Chhachhi.
11. “The Returns to Homeownership: An MSA Level Analysis,” Vol. 11, No. 2 (2007), pp. 115-120, Academy of Accounting and Financial Studies Journal, Christopher Brown and Indudeep Chhachhi.
12. “Instructional Technology Applications in Finance Classrooms,” (Fall, 2007), pp. 5-16, The Journal of Learning in Higher Education, Sam Thapa, Indudeep Chhachhi, Cathy Carey, and Johnny Chan.
13. “Determinants of Returns to Homeownership: County Level Analysis from 1999 to 2009,” Vol. 15, No. 7 (2014), pp. 1-15, Journal of Economics and Economic Education Research, Chris Brown, Indudeep Chhachhi, and Sam Thapa.
14. “Determinants of Capital Expenditures across Nations,” Vol. 12, No. 1 (2013), pp. 37-55, Indian Journal of Economics and Business, Vijaya Subrahmanyam, Indudeep Chhachhi, and Chris Brown.
15. “Leaping Black Swans,” Journal of Investing Vol. 28, No. 1 (2019), pp. 64-76, William Trainor, Indudeep Chhachhi, and Chris Brown.

A. Refereed Articles in Journals (continued)

16. “A Portfolio of Leveraged Exchange Traded Funds,” Financial Services Review (Accepted for publication in April, 2019), William Trainor, Indudeep Chhachhi, and Chris Brown.
17. “Using Barbells to Lift your Risk-Adjusted Returns,” Journal of Investment Consulting (Accepted for publication in September, 2020), William Trainor, Dan Cupkovic, Indudeep Chhachhi, and Chris Brown.

B. Invited, Editor-Reviewed Articles

1. “*The Best Books on Passive Investing: The Earth Does Revolve Around the Sun*,” (March 23, 2010), Advisor Perspectives, (co-authored with Ed Wolfe)

B. Invited, Editor-Reviewed Articles (Continued)

2. “*A Barbell Strategy for Downside Protection*” (August 23, 2019), Advisor Perspectives, (co-authored with Bill Trainor and Chris Brown)

C. Cases and Papers in Books

1. “Evidence on Foreign Direct Investments in the U.S.,” in M. Kreinin, International Commercial Policy: Issues in the 1990s (New York: Taylor and Francis, 1992), Indudeep Chhachhi, Ike Mathur, Nanda Rangan, and Sridhar Sundaram.

D. Papers Delivered at Conferences

1. “Specially Designated Dividends and Their Impact on Common Stock Returns,” Financial Management Association, October 1989, Boston, Massachusetts (co-authored with Stuart N. Rosenstein).
2. “A Comparison of Specially Designated Dividends to Share Repurchases via Tender Offers,” Midwest Finance Association, April 1991, St. Louis, Missouri (co-authored with Wallace Davidson).
3. “An Analysis of Synergistic Gains to Bidders and Targets in Mergers,” Midwest Finance Association, April 1991, St. Louis, Missouri (co-authored with Wallace Davidson and Louis T.W. Cheng)
4. “Foreign Direct Investments in the U.S.: The Case of Foreign Acquisitions,” International Trade and Finance Association, May 1991, Marseille, France (co-authored with Ike Mathur, Nanda Rangan and Sridhar Sundaram).

D. Papers Delivered at Conferences (continued)

5. “A Test for Price Pressure Effects in Tender Offer Stock Repurchases,” Midwest Finance Association, March 1992, Chicago, Illinois (co-authored with Wallace Davidson and John L. Glascock).
6. “Foreign Acquisitions in the U.S.: Evidence from Returns to Non-U.S. Bidders,” Financial Management Association, October 1992, San Francisco, California (co-authored with Sridhar Sundaram, Ike Mathur and Nanda Rangan).
7. “A Comparison of Corporate Payout Decisions: Specially Designated Dividends vs. Tender Offer Stock Repurchases,” Financial Management Association, October 1992, San Francisco, California (co-authored with Wallace Davidson).
8. “The Valuation Effects of the Mexican Debt Crisis: A Re-examination,” Southern Finance Association, November 1992, Jacksonville, Florida (co-authored with Ike Mathur and Sridhar Sundaram).
9. “International Acquisitions in the United States: Evidence from Returns to Foreign Bidders,” International Conference on Global Business Environment and Strategy, March 1993, Taiwan, Taiwan R.O.C. (co-authored with Ike Mathur, Nanda Rangan, and Sridhar Sundaram).
10. “International Acquisitions in the United States: Evidence from Returns to Foreign Bidders,” Decision Sciences Institute, November 1993, Washington, D.C. (co-authored with Ike Mathur, Nanda Rangan, and Sridhar Sundaram).
11. “Cross-Sectional Efficiency in Foreign Exchange Market,” Decision Sciences Institute, November 1994, Honolulu, Hawaii (co-authored with Ike Mathur, Seong-Hoon Yu, and Sridhar Sundaram).
12. “Board Composition and Shareholder Wealth: The Case of International Acquisitions,” Southern Finance Association, November 1995, Sarasota, Florida (co-authored with Ike Mathur and Sridhar Sundaram).
13. “A Production, Distribution and Investment Model for a Multi-National Company,” Global Conference on Small and Medium Industry and Business, January 1996, Bangalore, India (co-authored with Zubair Mohamed).
14. “Board Composition and Shareholder Wealth: The Case of International Acquisitions by U.S. Firms,” Midwest Fin. Association, March 1998, Chicago, Illinois (co-authored with Sridhar Sundaram).

D. Papers Delivered at Conferences (continued)

15. “An Empirical Analysis of International Acquisitions by U.S. Firms: The Relation between Board Composition and Shareholder Wealth,” Financial Management Association, October 1998, Chicago, Illinois (co-authored with Sri Sundaram).
16. “The Wealth Effects of Board Composition and Ownership Structure in International Acquisitions,” Southern Finance Association, November 1999, Key-West (co-authored with Sridhar Sundaram).
17. “The Euro, Multinational Corporations and Equity Prices,” Allied Academies, International Conference, October 2001, Las Vegas (co-authored with Sam Thapa).
18. “Regulation Fair Disclosure, Earnings Forecast and Equity Prices,” Allied Academies, International Conference, October 2001, Las Vegas (co-authored with Sam Thapa).
19. “The Returns to Homeownership: An MSA Level Analysis from 1989 to 1999,” Eastern Finance Association, April 2003, Orlando, FL (co-authored with Chris Brown).
20. “Instructional Technology Applications in Finance Classrooms,” Academic Business World International Conference, May 2007, Nashville (co-authored with Sam Thapa, Cathy Carey, and Johnny Chan).
21. “Bond Placement Failure—Does the Market Differentiate?” Academic Business World International Conference, May 2012, Nashville (co-authored with Sam Thapa and Chris Brown).
22. “Determinants of Returns to Homeownership: County Level Analysis from 1999 to 2009,” Allied Academies Conference, October, 2012, Las Vegas (co-authored with Chris Brown and Sam Thapa).
23. “A Portfolio of Leveraged Exchange-Traded Funds,” Eastern Finance Association Annual Meeting, April, 2019, Miami (co-authored with William Trainor and Chris Brown).

E. Working Papers

1. “Retirement Withdrawal Strategies Revisited—with an eye towards improving upside-downside capture” (co-authored with Bill Trainor and Chris Brown).

F. Invited Presentations/Contributions

1. “Crisis of Confidence,” Aravali Institute of Management, July 22, 2002, Jodhpur, India.
2. “Role of India in the Global Economy & Business,” Aravali Institute of Management, December 20, 2003, Jodhpur, India.
3. “Are you a Rational Investor? Investing Behavior & Psychology,” FPA of Kentuckiana, May 13, 2014, Louisville, Kentucky.
4. “Best Cities to Live In” Media Inquiry (WalletHub), August, 2015.
<http://wallethub.com/edu/best-worst-large-cities-to-live-in/14358/#indudeep-chhachhi>

G. Discussant/Session Chair

1. Southern Finance Association, Annual Meeting, November 21, 1991, Key West, Florida (Corporate Finance).
2. Financial Management Association, Annual Meeting, October 22, 1992, San Francisco, California (International Finance).
3. Financial Management Association, Annual Meeting, October 15, 1993, Toronto, Canada (International Finance).
4. Decision Sciences Institute, Annual Meeting, November 23, 1993, Washington D.C. (Financial Management).
5. Southern Finance Association, Annual Meeting, November 1995, Sarasota, Florida (Investments).
6. Financial Management Association, Annual Meeting, October, 2004, New Orleans, Louisiana (Financial Education).
7. Financial Management Association, Annual Meeting, October, 2006, Salt Lake City, Utah (Financial Education).
8. Academic Business World International Conference, Annual Meeting, May, 2012, Nashville, Tennessee (Financial Management)
9. Financial Management Association, Annual Meeting, October 17, 2013, Chicago, Illinois (Corporate Finance).

G. Discussant/Session Chair (continued)

10. Financial Management Association, Annual Meeting, October 16 - 17, 2014,

Nashville, Tennessee (Corporate Finance).

11. Financial Planning Association (Kentuckiana), Panelist on Market Outlook Panel, November 11, 2014, Louisville, Kentucky (Investments)
12. Jaypee Institute of Information Technology (India), Co-Chair, Finance Track, International Conference on Artificial Intelligence in Business, November 7 – 9, 2020 (postponed due to Covid-19).

H. FINRA Exams/Licenses, Continuing Education

1. Series 66—December, 2006
2. Series 7— January, 2007
3. Health and Life Insurance License—October, 2010
4. KY Long-Term Care Partnership II—February, 2012 (Continuing Education)
5. Regulatory Element (Continuing Education for Series 66 and 7)—May, 2012

I. Reviewer

1. Journal of Multinational Financial Management, 1991 & 1992
2. Journal of the Midwest Finance Association, July 1993
3. Principles of Corporate Finance (Chapters 2-6), Cheng-Few Lee, Joseph Finnerty, and Edgar Norton, August 1993.
4. Principles of Corporate Finance (Chapters 2, 3, 5), Cheng-Few Lee, Joseph Finnerty, and Edgar Norton, second review, May 1994.
5. Kentucky Journal of Economics and Business, May 1995.
6. Journal of Multinational Financial Management, 1997.
7. Financial Practice and Education, September 1998.
8. Contemporary Investments, Hearth & Zaima, 2nd edition, January 1999.
9. Financial Practice and Education, April 1999.
10. Emporia State Research Studies, May 1999.
11. Investment Analysis and Management, Mark Hirschey, January 2000.

I. Reviewer (continued)

12. The Financial Review, February 2000.

13. 2000 Conference on Emerging Issues in Business & Technology, July 2000.
14. The Financial Review, March 2001, October 2001, January 2002.
15. International Review of Economics & Finance, March, 2004.
16. Journal of the Academy of Marketing Science, November, 2004.
17. MAJB, May, 2006
18. External Referee for Excellence in Research Award at University of Tennessee at Martin, Summer, 2009
19. Journal of Investing, March, 2019
20. Journal of Investing, June, 2020

J. Grant Proposals

1. “Basic Principles of Finance & Investments-- Workshop for High School Teachers” Action Agenda Proposal Submitted to WKU. \$3,500. Approved, November 2001.
2. Aim-High Grants—2016 (Leaping Black Swans), 2018 (A portfolio of Leveraged ETFs), and 2020 (Using Barbells to lift your risk-adjusted returns)

K. Symposiums/Workshops/Conferences Attended

1. Banking Seminar for College Faculty, August 11 – 13, 1993, Madison, Wisconsin (Graduate School of Banking).
2. AACSB Continuous Improvement Symposium, September 12 – 14, 1999, Minneapolis, Minnesota.
3. Evaluating Teaching: Minimizing Harmfulness and Maximizing Helpfulness, August 2001, Bowling Green, Kentucky.
4. Animating Power Point, September 2001, Bowling Green, Kentucky.
5. Boston College Finance Conference, March 12, 2004, Boston, Massachusetts.
6. Aspiring Dean’s Workshop, December 2004, Dallas, Texas.

K. Symposiums/Workshops/Conferences Attended (continued)

7. When Leadership Matters Most; Ethics and Governance Conference, July 19 –

20, 2006, Washington, D.C.

8. The Art & Craft of Discussion Leadership (presented by Harvard Business School Publishing), May, 2008, Atlanta, Georgia.
9. Certified Financial Planner Board of Standards Inc.—Program Directors’ Conference, August 13-15, 2009, Arlington, Virginia.
10. Certified Financial Planner Board of Standards Inc.—Program Directors’ Conference, August 12-13, 2010, Arlington, Virginia.
11. Executive Communications Skills Workshop (presented by Singleton Group), January 10-11, 2011, Bowling Green, Kentucky.
12. Behavioral Finance Symposium—a New Perspective on Risk: The Impact of a Diverse Wall Street, presented by the Galter Institute at University of Tennessee at Chattanooga, October 11-12, 2011.
13. TD Ameritrade Advisor Conference, January 29 – 31, 2014, Orlando, Florida (2 students accompanied: Griffin Fruge & Sabina Smailhodzic)
14. TVA Investment Challenge Conference & Career Fair, November 20 – 21, 2014, Nashville, Tennessee.
15. Overview of SAS Workshop, January 15, 2015, Bowling Green, Kentucky.
16. TD Ameritrade’s Advisor Conference, January 28 – 31, 2015, San Diego, California (2 students accompanied: Jason Simpson & Taylor Linville)
17. TD Ameritrade’s Advisor Conference, February 3 – 5, 2016, Orlando, Florida (2 students accompanied: Jacob Larue & Haley Burgin)
18. Financial Management Association Annual Meeting, October, 2016, Las Vegas
19. TD Ameritrade’s Advisor Conference, February 1 – 4, 2017, San Diego, California (2 students accompanied: Savannah Stone & Elijah Essa)
20. TD Ameritrade’s Advisor Conference, January 31 - February 3, 2018, Orlando, Florida (2 students accompanied: August Snelbaker-Hemmerich & Alec Broughton)
21. TD Ameritrade’s Advisor Conference, February 5 – 9, 2019, San Diego, California (2 students accompanied: Caitlyn Thornton & Caleb Lee)

K. Symposiums/Workshops/Conferences Attended (continued)

22. Financial Management Association Annual Meeting, October, 2019, New Orleans

23. TD Ameritrade's Advisor Conference, January 28 – February 1, 2020, Orlando, Florida (2 students accompanied: Hope Rowlett & Seth Newby)

UNIVERSITY ACTIVITIES

Western Kentucky University

- ***Member, Steering Committee for New Business Building—April, 2022 – June, 2023***
- Member, GFCB Committee to Review Faculty Qualifications under the 2020 AACSB Standards—September, 2020 - 2021
- Kentucky FBLA Judge, 2022 - 2023
- New Department Head Training, Panel Discussion (organized by the Provost's office), January 2022
- New Department Head Training, Panel Discussion (organized by the Provost's office), Improving Communication, July 2023
- ***Member, Strategic Resource Optimization Review Steering Committee—April – June, 2020***
- ***Member, Mattie Newman Ford Professor of Entrepreneurship Search Committee—May – June, 2020***
- ***Mentor for New Department Chairs (Mark Ross & Whitney Peake)—2019 - 2021***
- ***Chair, Associate Dean Search Committee, GFCB—December, 2019 – March, 2020***
- ***Member, Dean Search Committee, GFCB—September, 2018 – March, 2019***
- ***Member, WKU Academic Fee Review Committee—July, 2019 – February, 2020***
- ***Chair, WKU Budget Council—August, 2017 – March, 2018.***
- ***Chair, GFCB Fiscal Oversight Committee—2015 – 2016***
- ***Member, WKU Foundation External Investment Advisory Board, March, 2017 – 2022.***
- Promotion Committee for Dr. Claudia Strow (Economics)—2015
- Coordinated with Kari Aikins to offer a *Financial Well-Being* program for WKU Faculty/Staff in 2016 (under the auspices of CFS)
- Faculty Mentor for Andrew Head and Ron Rhoades—Fall, 2015 – Spring, 2016
- ***“The Perfect Retirement Omelet – Tips and trips for whisking together the best retirement recipe with your Nest Egg, Social Security and Pension Benefits.” HR sponsored seminar presented to WKU employees and staff during ‘Spring Retirement Savings Week’—April 16, 2015***
- ***Gordon Ford Leadership Team (formerly, Administrative Council), 2016 - present***
- Gordon Ford College of Business Curriculum Committee, 1999 – 2007 and 2011 – 2015.
- ***Chair, Pedagogical Assistant Professor Search (Finance)—2014***
- Promotion Committee for Dr. Brian Strow (Economics)—2014
- GFCB's Fiscal Resources Task Group—2014

Western Kentucky University (Continued)

- ***“Happy 5th Birthday Bull Market!—Are you starting to show your age?” HR***

sponsored seminar presented to WKU employees and staff during 'Spring Retirement Savings Week'—April 7, 2104

- Bowling Green High School College and Career Fair—March 27, 2014
- *Provost's Budget Council—2013 – 2016*
- *President's ad hoc MOOC Taskforce—2013*
- Search Committee for Manager, Total Compensation (Human Resources)—2013
- *"Are you distracted by the 8%—How Investors often ignore 92% of their Portfolio's Risk and what could be number one driver of Portfolio Return?" HR sponsored seminar presented to WKU employees and staff during 'Spring Retirement Savings Week'—April 15, 2013*
- *WKU Budget Council, 2012 – 2017*
- Chair, sub-committee (GFCB Curriculum Committee) for Reviewing Math Requirement, 2012 - 2013
- Associate Dean (Graduate/Research) Search Committee—2012
- *Chair, Dr. Ling Lo's Promotion and Tenure Committee, 2012*
- Sub-committee (GFCB Graduate Committee) for Evaluating Communications Presentations for Dr. Randy Capps' class 2012
- *"Test your Investing Behavior—Are you a Rational Investor?" HR sponsored seminar presented to WKU employees and staff during 'Spring Retirement Savings Week'—April 19, 2012*
- Developed (along with Dr. Shane Spiller) New Faculty Mentor Proposal and Organized College Luncheon for New Faculty and their Mentors, August, 2012
- Infrastructure Committee—2011 – 2014
- *Finance search committee for PQ faculty—2010*
- Financial Literacy Presentations to Lauren Bland's Communication Disorder Graduating Students (annual)—2009 - present
- Graduate Committee, 2009 – 2014
- *"Taking the Retirement Leap" HR sponsored seminar presented to WKU employees and staff during 'Retirement Week'—April 13, 2011*
- ***Chair, MBA Committee, 2008 – 2009***
- Committee to Review and Update GFCB's Annual Evaluation Document—2011
- Finance Faculty Search Committee—2010
- *President's ad hoc Committee on WKU's Insurance Fund Reserve, 2009 - 2010*
- *President's ad hoc Committee on Continuance and Tenure, 2009 - 2010*
- *Faculty Sponsor/Mentor for WKU's entry in CFA's Global Investment Research Challenge Competition, 2009-2016WU*
- *"Investment Strategies for These Wild Times" HR sponsored seminar presented to WKU employees and staff—April 14 & 15, 2009*
- Academic Quality Committee, 2008 – 2011
- Building Committee, 2008 – 2010
- *"WKU Roth 403(b) Plans" HR sponsored seminar presented to WKU employees and staff—November 12, 2008*

Western Kentucky University (Continued)

- *"Preparing for Retirement" HR sponsored seminar presented to WKU employees and*

staff—February 5 & 6, 2008

- Faculty grievance and Continuance pool, 2007- 2012
- Faculty Advisor to India Student Association, 2001 & 2003 – 2010
- Search Committee for Director of Development, Gordon Ford College of Business, 2006
- *Dean's Administrative Council, 1999 - 2007*
- *President's ad hoc Committee (Campus Environment), 2004 – 2007*
- Finance Faculty Search Committee (all of them), 2008 - 2016
- **Chair, Associate Dean Search Committee, 2001**
- Volunteer in the “Investing in the Spirit-- The Campaign for WKU,” 2001
- Screening Committee for J.C. Holland Professorship in Accounting, 1999
- College Scholarship Committee, 1995 - 2000
- *President's ad hoc Committee (Student Health Services), 1998 - 1999*
- MBA Committee, 1996 - 1999
- Chair, Non-Resident Fee Committee, 1998 - 2005
- Finance Faculty Search Committee, 1997 - 1998
- College Faculty Search Committee, 1996- 1997
- University Academic Probation Committee, 1994
- Scholarship Committee, 1994 - 2001
- Committee to Develop Guidelines for the Professional Development Committee of College of Business, Chair, 1993 - 1995
- Faculty Advisory Committee, 1991 - 1993
- Non-Resident Fee Committee, 1991 - 2010

PROFESSIONAL AFFILIATIONS

- Financial Management Association

PUBLIC SERVICE/CONSULTING

- **WNKY Interview:** <https://www.wnky.com/inflation-skyrockets-to-40-year-high-wku-dr-sees-no-immediate-end/>
- **Outlook interview with Barbara Deeb on Macro Financial Issues and state of Pension Crisis in Kentucky—March, 2016**
 - <https://www.youtube.com/watch?v=3c7-z0CDAyc>
- **Member, Kentucky Chamber Public Pension Working Group—August, 2015 - present**
- *Personal Financial Planner, Cerity Partners (formerly, ARG Financial Group)—September 1, 2006 – present*

PUBLIC SERVICE/CONSULTING (continued)

- “Academic Concepts 401—A crash Course on Important Financial Concepts,” A

Presentation to ARG Financial Group—December 17, 2013

- “Behavioral Finance—The New Frontier,” A Presentation to ARG Financial Group—December 17, 2013
- Parent Representative on Bowling Green Junior High School SBDM Council—July, 2013 – June, 2014.
- *WBKO Interview on Fiscal Cliff—November, 2012*
- *President, Bowling Green Junior High School PTO—July, 2012 – June, 2013*
- *“Top 5 Mistakes every Investor makes,” A Presentation to Warren County Medical Society—August 7, 2012*
- *Vice-President, Bowling Green Junior High School PTO—July, 2011 – June, 2012*
- Parent Representative on Bowling Green Junior High School SBDM Council—July, 2009 – June, 2010.
- *Parent Representative on 5-member team for principal (Bowling Green Junior High School) search—December, 2009 – May, 2010*
- A presentation on ‘Sikhism’—Unitarian Universalist Church of Bowling Green. Sunday Service (2008) and Children’s discovery of Religions of the World (2009)
- Feasibility Study for Dyna Harvest, Inc. (USDA Loan)—February to July, 2006
- Affidavit on Appropriate Interest rate in the case of Colleen Jackson V. Justin B. Duncan, et al.—January, 2005
- *President, Board, Plum Tree Montessori School—July, 2004 to May, 2005.*
- Feasibility Study for Trace Die Cast, Inc. (USDA Loan)—June to August, 2004.
- Financial analysis of potential and current suppliers (Sumitomo Electric Wiring Systems, Inc.)—March/April 2003.
- *Member, Bowling Green Independent School District Strategic Planning Group, October, 2001 – January, 2002.*
- Four Investment Seminars given to Brokers at Robo Enterprises, Bowling Green, Kentucky-- January/February, 2001.
- Member, Board, Plum Tree Montessori School, July, 2000 – June, 2001; July, 2003 – May, 2005.
- WKYU-FM interview with Jeanine Howard Cherry on Online Investing; Broadcast on June 21, 1999.