

DR. GREG FILBECK, CFA, FRM, CAIA, PRM
PAPER PRESENTATIONS (62)

Greg Filbeck, Raymond Gorman, and Xin Zhao, "SOX and the Regulated Firm," Southern Finance Association Meeting, November 2009, Captiva Island, FL.

Greg Filbeck, Dianna Preece, and Xin Zhao, "Top Performing Banks: Size Effects and Economic Cycles," Southern Finance Association Meeting, November 2009, Captiva Island, FL.

Greg Filbeck, Diane Parente, and John Roth, "Teaming: Collaboration Efforts between Courses in Corporate Finance and Manufacturing Engineering," Southern Finance Association Meeting, November 2008, Key West, FL.

Greg Filbeck, Dianna Preece, and Xin Zhao, "Top Performing Banks: The Benefits to Investors," Southern Finance Association Meeting, November 2008, Key West, FL.

Greg Filbeck, Peg Thoms, and Brian Boscaljon, "Employee Rewards and the Likelihood of a Successful Initial Public Offering," Southern Finance Association Meeting, November 2008, Key West, FL.

Greg Filbeck, Raymond Gorman, and Xin Zhao, "The 'Best Corporate Citizens:' Are They Good for Their Shareholders" Financial Management Association Meetings, October 2008

"Bond Ratings and Bank Loan Announcements: The Effect on Equity Pricing," with Brian Boscaljon and Dianna Preece, Southern Finance Meetings, November 2007

"Management Age and the Mutual Fund Performance," with Dan Tompkins, Southern Finance Meetings, November 2007

"The 'Best Corporate Citizens:' Are They Good for Their Shareholders," with Ray Gorman, Southern Finance Association Meetings, Destin, FL, November 2006

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"An Annual Rebalancing Strategy to Create Efficient Portfolios," with Brian Boscaljon and Chia-Cheng Ho, Southern Finance Association Meetings, Key West, FL, November 2005

"CFO's Working Capital Survey: Do Selected Firms Work for Shareholders?" with Thomas Krueger and Dianna Preece, Southern Finance Association Meetings, Key West, FL, November 2005

"Business Method Patents as Non-Financial Indicators of Firm Value," with Brian Boscaljon and Tim Smaby, Southern Finance Association Meetings, Naples, FL, November 2004

“How Efficient Are Common Benchmarks?” with Brian Boscaljon and Chia-Cheng Ho Financial Management Association Meetings, Denver, October 2004

“And the Winner Is: Does Advertising in Media Events Create Shareholder Value?” with Peggy Choong and Daniel L. Tompkins, Southern Finance Association Meetings, Charleston, SC, December 2003

“Risk Aversion and Personality Type – II,” with Patty Hatfield and Philip Horvath, Southern Finance Association Meetings, Charleston, SC, December 2003

“CFO’s Working Capital Survey: Do Selected Firms Work for Shareholders?” with Thomas Krueger and Dianna Preece, Southern Finance Association Meetings, Charleston, SC, December 2003

“Industry Related Differences in Working Capital Management,” with Thomas Krueger, Southern Finance Association Meetings, Charleston, SC, December 2003

“Risk Aversion and Personality Type,” with Patty Hatfield and Philip Horvath, Midwest Finance Meetings, St. Louis, March 2003

“Management Tenure and the Risk Adjusted Performance of Mutual Funds,” with Daniel L. Tompkins, Southern Finance Association Meetings, Key West, FL, November 2002

“Targeting the Ad Bowl: Is it a Super Strategy?” with Peggy Choong, Daniel Tompkins, and Thomas Ashman, Allied Academies International Conference, Las Vegas, October 2002

“The Relationship Between Environmental and Financial Performance of Public Utilities: The Role of Regulatory Climate,” with Raymond Gorman, Southern Finance Association Meetings, Destin, FL, November 2001

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“Supply Chain Management and Company Value,” with Raymond Gorman and Thomas Speh, Southern Finance Association Meetings, Destin, FL, November 2001

“Capital Structure and Asset Utilization: The Case of Resource Intensive Industries,” with Ray Gorman, Southern Finance Association Meetings, Savannah, GA, November 2000

“Women Key Executives, Management Succession, and the Impact on Stock,” with Sue Visscher, Karen Eastwood, and Sharon Garrison, Southern Finance Association Meetings, Savannah, GA, November 2000.

“Productivity and Leverage: Relationship and Causality,” with Raymond J. Gorman, Southern Finance Association Meetings, Savannah, GA, November 2000.

“The Option to Withdraw Seasoned Equity Issues,” with Daniel L. Tompkins, Southern Finance Association Meetings, Savannah, GA, November 2000

“Fortune’s 100 Best Companies to Work for in America: An Empirical Analysis,” with Dianne Preece, Southern Finance Association Meetings, Savannah, GA, November 2000

“Investment Merits of the World’s Most Admired Firms,” with Tom Krueger, Southern Finance Association Meetings, Savannah, GA, November 2000

“The Financial Performance of Organizations and Key Executives,” with Karen Eastwood, Sharon Garrison, and Sue Visscher, International Conference on Information Systems Analysis and Synthesis, Orlando, FL, July, 2000

“Board Size: Valuation and Profitability of Small U.S. Firms” with Sharon K. Lee and Mark A. Coffey, Eastern Finance Association Meeting, Myrtle Beach, SC, April 2000

“The Impact of Managerial Ownership on Layoff Announcements,” with Shelly Webb, Southern Finance Association Meeting, Key West, November 1999

“Financial Practices in Family Business,” with Sharon Lee, Southern Finance Association Meeting, Key West, November 1999

“Mother Jones: Does “Better Place to Work” Imply “Better Place to Invest?” Southern Finance Association Meeting, Key West, November 1999

“Announcement Effects of Working Mother Magazine’s Annual Survey of Family-Friendly Firms” with Dianna Preece, Southern Finance Association Meeting, Key West, November 1999

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“Valuation and Board Size: Further Information on Firm Size Effects,” with Sharon Lee and Jamie Pawlukiewicz, Midwest Finance Annual Meeting, Nashville, March 1999

“Faculty Internships in Family Business,” with Debbe Skutch and Deborah J. Dwyer, United States Association for Small Business and Entrepreneurship Annual Meeting, San Diego, CA, January 1999

“Dividend Yield Strategies in the Canadian Stock Market,” with Sue Visscher, Southern Finance Association Annual Meeting, San Marcos Island, FL, November 1998

“*Built to Last, Built for Value?*” with Raymond Gorman and Sue Visscher, Southern Finance Association Annual Meeting, San Marcos Island, FL, November 1998

"Institutional Ownership and Share Price Response to New Equity Offerings: Is There An Industry Effect" (solo authored paper), Southern Finance Association Annual Meeting, Baltimore, MD, November 1997

"Executive MBA Education: Using Learning Styles for Successful Teaching Strategies" with Shelly Webb, Baltimore, MD, November 1997

"The Variability of Beta: Another Dimension of Risk Exposure and Assessment" with Greg Filbeck, Bruce Kuhlman, and Herb Weinraub, Baltimore, MD, November 1997

"Does Being a Family Friendly Firm Pay? Evidence From Share Price Performance," with Dianna Preece, Financial Management Association Annual Meeting, Honolulu, Hawaii, October 1997

"The Easterbrook Hypothesis, Regulation and the Impact of Dividend Payments and Agency Costs in Bank Holding Companies" with Don Mullineaux, Southern Finance Association Annual Meeting, Key West, FL, November 1996

"Does Being a Family Friendly Firm Pay? Evidence from Share Price Performance," with Dianna Preece, Southern Finance Association Annual Meeting, Key West, FL, November 1996

"Dividend Yield Strategies in the British Stock Market" with Sue Visscher, Southern Finance Association Annual Meeting, Key West, FL, November 1996

"Britain's Most Admired Firms: Are They Worth It?" with Dianna Preece, Southern Finance Association Annual Meeting, Sarasota, FL, November 1995

"Agency Theory and the House Banking Scandal" with Don Mullineaux and Dianna Preece, Southern Finance Association Annual Meeting, Sarasota, FL, November 1995

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"Public Utility Companies: Regulation, Institutional Ownership, and The Share Price Response to New Equity Issues" with Patty Chadwell, Southern Finance Association Annual Meeting, Sarasota, FL, November 1995

"Learning Styles, Teaching and Testing Strategies, and Predictors of Success for Students in Corporation Finance" with Linda Smith, Southern Finance Association Annual Meeting, Sarasota, FL, November 1995

"Insider Trading and Regulation: The Case of Bank Holding Companies" with Don Mullineaux, Southern Finance Association Annual Meeting, Charleston, SC, December 1994

"Institutional Ownership and Share Price Response to Announcements of New Common Stock Issues of Bank Holding Companies", Southern Finance Association Annual Meeting, Charleston, SC, December 1994

"Share Price and Wealth Effects of Corporate Layoffs: A Methodology Modification" with Philip Horvath and Patty Chadwell, Eastern Finance Association Annual Meeting, Boston, MA, April 1994

"Agency Theory and the House Banking Scandal" with Don Mullineaux and Dianna Preece, Southern Finance Association Meeting, New Orleans, LA, November 1993

"Prospect Theory and Incentive Implications of ESOPs on Employee Attitudes Toward Firm Valuation" with Ray Gorman, Southern Finance Association Annual Meeting, Jacksonville, FL, November 1992

"*Fortune's* Most Admired Firms: An Investor's Perspective" with Ray Gorman and Dianna Preece, Southern Finance Association Annual Meeting, Jacksonville, FL, November 1992

"Behavioral Aspects of the Intra-Industry Capital Structure Decision" with Ray Gorman and Dianna Preece, Financial Management Association Annual Meeting, San Francisco, CA, October 1992

"Shareholder Wealth Implications of Layoff Announcements," with Patty Chadwell, Southern Finance Association Annual Meeting, Key West, FL, November 1991

"Self Deception and Financial Decision Making," with Ray Gorman and Dianna Preece, Southern Finance Association Annual Meeting, Key West, FL, November 1991

"Agency Theory and The Impact of Corporate Layoffs on Shareholder Wealth," with Patty Chadwell, Eastern Finance Association Meeting, Hot Springs, VA, April 1991

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"The Impact of Inside Ownership Concentration on Share Price Response of Dividend Increase Announcements by Bank Holding Companies," with Patty Chadwell, Midsouth Academy of Economics and Finance, Shreveport, LA, February 1991

"Regulatory Monitoring and the Impact of Bank Holding Company Dividend Changes on Equity Returns," with Don Mullineaux, Midwest Finance Association Annual Meeting, Chicago, IL, March 1990

"Dividend Policy and Ownership Concentration: Capital Market Evidence in the Case of Commercial Bank Stocks," with Patty Chadwell and Dennis Officer, Eastern Finance Association Annual Meeting, Philadelphia, PA, April 1989

Other Scholarly Activities

Advisory Board Member and Reviewer, *Journal of Business and Economic Perspectives*

Reviewer, *Quarterly Journal of Business and Economics*
Reviewer, *Financial Practice and Education/Journal of Applied Finance*
Reviewer, *Journal of Economics and Finance*
Reviewer, *Mid-American Journal of Business*
Reviewer, *Family Business Review*
Reviewer, *International Review of Economic and Finance*
Reviewer, *Financial Services Review*
Reviewer, *Managerial and Decision Economics*
Reviewer, *Journal of Environmental Management*
Reviewer, *Environmental and Resource Economics*
Review, *Journal of Bangladesh Studies*
Reviewer, Harper-Collins Publishing Company
Reviewer, Irwin Publishing Company
Reviewer, Prentice-Hall Publishing Company
Session Planner, Midwest Decision Science Institute

Participation in Academic Meetings

Financial Management Association Meeting - 1988-1993, 1997, 2005
 Presenter - 1992, 1997, 2004
 Discussant - 1989, 1991, 1993
Southern Finance Association Meeting - 1991-2007
 Special Session Organizer - 1997
 Program Committee - 1995, 1997
 Presenter - 1991-2007
 Session Chair – 1995, 2003
 Discussant - 1992, 1994

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International Conference on Information Systems Analysis and Synthesis – 2000
 Presenter - 2000
United States Association for Small Business and Entrepreneurship
 Presenter - 1999
Eastern Finance Association Meeting - 1989, 1991, 1994, 2000
 Presenter - 1989, 1991, 1994, 2000
Midsouth Academy of Economics and Finance - 1991
 Presenter - 1991
Midwest Finance Association Meeting - 1990, 1999, 2003
 Presenter - 1990, 1999, 2003
 Discussant – 1990
Allied Academies International Conference – 2002
 Presenter - 2002

RECORD OF PARTICIPATION IN, AND DESCRIPTION OF, SEMINARS AND

WORKSHOPS

Panelist. Family Controlled Firms: Present and Future Research. Southern Finance Association, annual meeting, Key West FL, November 2008.

Finance Trading Floor. Presenter, Midwest Decision Sciences Institute, annual meeting, Erie PA, April 2008.

iMBA Training Session. Attendee, Penn State University, University Park PA, October 2008.

Quality Assurance e-Learning Design. Attendee, iMBA Program, Penn State University, October 2008.

Best Practices in Online Instruction. Attendee, World Campus, Penn State University, University Park, April 23 and May 11 2007.

The Roth 401(k): A Contrarian View. Attendee, Audio Conference, Society of Financial Service Professionals, April 11, 2007.

Session Chair. Executive Compensation. Session Chair, Southern Finance Association, annual meeting, Charleston, NC November 2007.

Teaching to All Types: MBTI and Learning Styles. Presenter, The Penn State Behrend College Teaching Seminar Series, Penn State Erie, Erie PA, October 2007.

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Best Corporate Citizens. Presenter, Black School of Business Research Seminar, Penn State Erie, Erie PA, December 2006.

First Year Seminar. Speaker on finance major, Black School of Business, Penn State Erie, Erie PA, 2008; 2007; 2006.

Teaching Effectiveness. Attendee, Orientation for New Faculty, Penn State Erie, Erie PA, August 2006.

DESCRIPTION OF OUTREACH OR OTHER ACTIVITIES IN WHICH THERE WAS SIGNIFICANT USE OF CANDIDATE'S EXPERTISE

Consulting

Schweser, La Crosse WI, 2008; 2007; 2006.

North Carolina Organist Guild, 2006.

Media Interviews

WSEE TV, Erie PA. November 24, 2008; Bruce Gray speaker series, November 10, 2008; September 15, 2008; June 15, 2008; Global Market Outlook, February 13, 2008; Stock Market, January 22, 2008.

WJET TV, Erie, PA. Black Monday, October 29, 2007.

Erie Times-News, Erie PA. Her Times, by Pam Liccardi, July 12, 2007; with Jim Martin, April 15, 2007.

WP\$E Radio, Penn State Erie, Erie PA. December 15, 2008; December 9, 2008; ME/FNC Joint Project, December 17, 2007; September 18, 2006.

Speaking Engagements

Erie Optimist Club, Erie PA, 2008.

Grants

Center for Teaching Excellence and College of Business Administration Faculty Development Fund, two grants awarded for completion for attending the Financial Analysts Review course in Salt Lake City, May 1998, in preparation for Level 3 of the CFA designation.

"Teambuilding and Conflict Management: Strategies for Family Businesses, Summer 1996, University of Toledo Center for Family Business

Course development grant, Principles of Investments, Summer 1994, Miami University

"Agency Theory and the Impact of Corporate Layoffs on Shareholder Wealth" Summer 1993, Miami University Department of Finance Research Grant

**DESCRIPTION OF NEW COURSES AND/OR PROGRAMS DEVELOPED,
INCLUDING SERVICE LEARNING AND OUTREACH COURSES**

FIN 481: International Finance. Developed new course based on curricular changes in finance, which replaced FIN 480, 2008.

**DESCRIPTION OF NEW METHODS OF TEACHING ESTABLISHED COURSES
AND/OR PROGRAMS**

FIN 480: Financial Management and Control. Redesigned existing course. 2008.

B ADM 501: Costs, Competition, & Market Performance. Incorporated (with J. Voss and K. King) an integrative case into the course including a presentation to faculty team. 2007.

FIN 405/ME 468: Financial Management/Engineering for Manufacturing. Designed a joint product worth twenty percent of each course's grade whereby teams were formed across both class (five ME majors/two FNC majors) for a joint project. The development included the incorporating of teaming guidelines, joint presentation, media focus, coordination between both engineering and business, pre- and post-surveys, use of the MBTI – all to facilitate a group project requiring students to form teams and make a financial determination of whether a proposed manufacturing company would be viable within a hundred-mile radius of Erie. From site selection to investigating governmental grants, students were expected to create all financials from scratch and determine means of financing the business. Fall 2007; Incorporated a case approach. Spring 2007.

iMBA 574: Strategic Financial Decisions. Completely revamped existing course in lieu of curriculum changes in the iMBA program. Summer 2007.

**RECORD OF COMMITTEE WORK ON CAMPUS, COLLEGE, DEPARTMENT, AND
UNIVERSITY LEVELS**

Black School of Business:

Ad-Hoc Promotion to Full Professor Committee	Chair	2007-09
Annual Review Committee	Chair	2008-11
	Elected member	2007-11
Promotion and Tenure Committee	Elected member	2008-10
Peer Reviewer of Teaching	Appointed Member	2008 2007

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**PARTICIPATION IN CAMPUS AND/OR UNIVERSITY-WIDE GOVERNANCE BODIES
AND RELATED ACTIVITIES**

Member, Faculty Council, Penn State Erie, Erie PA, 2007-:
Chair, 2008.
Vice-Chair, 2007.

RECORD OF ADMINISTRATIVE SUPPORT WORK

Decision Associates. Incorporate family business curriculum for Black School of Business, Penn State Erie, Erie PA, with Dr. John Magenau, 2008.

Drafted revised bylaws for IMBA program, 2008.

Accompanied students to six CFA Society meetings, Pittsburgh PA, 2007.

Attendee, Black School of Business, Penn State Erie, Erie PA:
Erie Round Table Meeting, February 2008.
Business after Hours, July 2007.
MBA Information Session, May 2008; May 2007.
Business Bridge, Fall 2007; Fall 2006.
Meet the Faculty Luncheon, October 2008; November 2007; October 2007; November 2006.

Served on the strategic alliance and partnerships exploratory meeting with Erie Insurance, Erie PA, August 2007.

Small Group Leader, Freshman Orientation, Penn State Erie, Erie PA, August 2007.

Participant. MBA orientation/open house, Black School of Business, Penn State Erie, Erie PA, Fall 2007; Spring 2007.

Classroom Observation Mentor, Penn State Erie, Erie PA:
Math Education Students, 2007.
Qi Dunsworth, 2007.
Jessica Zhao, 2007.

Attendee, iMBA instructional meeting, Penn State University, University Park, Fall 2007; Spring 2007.

Participant, Major Event, Black School of Business, Penn State Erie, Erie PA, March 2008; March 2007; October 2006.

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Member, Career Placement Committee, Penn State Erie, Erie PA, 2007; 2006.

Finance Majors and Alumni, Penn State Erie, Erie PA:

Created and maintain Facebook, 2008.

Published two finance newsletters, 2008.

Hosted FIN alumni event, September 2007.

Developed Alumni database, 2006.

Held strategic planning sessions for finance faculty, Penn State Erie, Erie PA, 2006.

Revised online marketing materials for Finance major, 2006.

In-charge Person, Finance, Black School of Business, Penn State Erie, Erie PA, 2006-.

ASSISTANCE TO STUDENT ORGANIZATIONS

Finance Club:

Adviser, 2008

Published two newsletters for Finance Club (and undergraduate students interested in Finance), 2008.

Hosted event, October 2008; April 2008.

Guest Speaker, September 2007.

OTHER SERVICE TO THE UNIVERSITY

Established Finance Speaker Series, Penn State Erie, Erie PA, 2008.

Served on Penn State Lehigh Valley's Promotion and Tenure Committee (external committee member), three candidates, Fall 2007.

United Way Campaign:

Member, Penn State University Committee, 2007.

Volunteer, Penn State Erie, Erie PA, 2007.

PARTICIPATION IN COMMUNITY AFFAIRS

Worked with Ed Palattella of Erie Times regarding valuation of swaps with the Erie School District, 2007.

Represented Behrend at the Private Client Group of National City's Financial Market Outlook, July 2007.

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ACTIVE PARTICIPATION IN PROFESSIONAL AND LEARNED SOCIETIES

Session Organizer. Finance Track, Midwest Decision Sciences Institute, annual meeting, Erie PA, April 2008.

Member, Committee - Curriculum Review for Pre-Level 1, Chartered Alternative Investment Analyst Association (CAIAA), 2006.

Former Service - University of Toledo

- Faculty Senate - appointed Parliamentarian, chair of Constitution and Rules Committee, served as a representative for the School of Business Administration, served on Implementation Committee.
- Board of Trustees - Toledo Campus Ministries, Program Committee Chairman; assist in fund raising drive and annual meeting, interaction between campus and community.
- Speaker's Bureau, serve as spokesperson to the media on topics related to investments; have served as a resource for television (WNNO-TV), radio (WSPD) and newspaper (*Toledo Parent* among others)
- Student Academic Adviser, met with students to discuss scheduling and careers
- Faculty Advisor, Christian Student Fellowship
- Coordinator, Entrepreneurship, Family and Small Business (EFS) major, responsible for advising and promotion of the major.
- Faculty Affairs Committee, elected position charged with all matters related to faculty life including tenure and promotion decisions.
- Graduate Students Committee, committee was charged with facilitating changes in the MBA curriculum.
- Adviser, Family Business Student Association (FBSA), recognized as one of two model associations in March 1998 issue of *Nation's Business*.
- Adviser, Family Business Internship Program
- Assessment Committee, College of Business Administration, charged with assessment of teaching excellence.
- Enrollment and Retention Committee, 1995-1996, College of Business Administration; charged with seeking ways of improving enrollment and increasing retention.
- College of Business Administration Placement Committee, 1994-1995, charged with assisting in placement activities of students.
- Center for Family Business - served as guest speaker for forum on Conflict Management and Teambuilding (March 1996) and facilitated Affinity Group forum

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Professional organization service

Journal of Business and Economics Perspectives, Editorial Board Member, 2007-present

Society of Financial Services Professionals, 2006-present
National Investment Management Editor for newsletter, 2007-present
Board Member, Northwest Erie Chapter, 2007-present

Erie Day School, 2006-present
Board of Trustees Member, 2007-present
Finance Committee, 2006-present, Chairman, 2007-present

CFA Society of Pittsburgh, 2006 to present
Coach, CFA Investment Challenge, Behrend Team

Kaplan University, 2005 to present
Advisory Board Member, College of Business

Bethany Lutheran Homes, La Crosse, WI, 2000-2006,
President, 2003-2005;
President-Elect and Treasurer, 2000-2003,
Chairman of the Fund Development Committee, 2000-2001

Habitat for Humanity, La Crosse, WI, 2000-2005,
President, 2002-2004,
Secretary, 2000-2002

Twin Cities Society of Financial Analysts, 2004-2006
Guest speaker, 2003, 2004

Financial Analyst Society of Toledo (FAST) - 1994-1999
Education Chair, 1998-1999
President, 1997-1998
Secretary, 1996-1997

Black Swamp Investors, 1996-1999
Presiding Officer, 1996-1997, 20 member investment club

Friendly Center – 1995-1999, a nonprofit in the four poorest corridors of North Toledo;
President, 1998, 1999
Vice President and Finance Committee Chairman; 1997; responsible for overseeing preparation of
\$500,000 budget

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Leadership Toledo, 1998-1999, mission is to foster leadership involvement by developing an awareness of community needs and opportunities.

Resource Development Committee - responsible for solicitation of funds for group.

Program Committee - responsible for overseeing and planning monthly programs

Paraclete, 1998-1999, a Christian organization dedicated to facilitating the placement of children in foster homes.

Other Private professional consulting

TypeWorks, Director and PeopleWorks - Co-Director; specializing in conflicts management/team building organization utilizing the Myers-Briggs Type Indicator as well as learning styles workshops for area secondary and post-secondary teachers.

Professionally Registered Parliamentarian - Certified a registered (1992) and professionally (1999) registered parliamentarian offering work for conventions and businesses in conducting effective meetings.

Community Service/Civic Involvement

National Association of Parliamentarians, 1983-present

Pennsylvania Association of Parliamentarians, 2006-present

Wisconsin Association of Parliamentarians, 1999-2006

- District IV Convention Treasurer, 2005
- State Treasurer, 2001-2003

Ohio Association of Parliamentarians, 1989-1999

- Maumee Valley Unit of Parliamentarians, 1994-1999
- Greater Cincinnati Unit of Parliamentarians, 1989-1994; President, 1992-1994

La Crosse Area Genealogical Association, 1999-2006, Secretary, 2000-2006

Erie Astronomy Club, 2006-present

Greater La Crosse Area Astronomy Club, 1999-2006

Association of Psychological Type, 2000-2006, Treasurer, 2003-2006

Leadership Toledo - 1996-1997 Class - An organization dedicated to educating future leaders of Toledo on all facets of Toledo community life fostering community involvement. Received a scholarship to cover partial tuition, remainder from other sources. One of forty selected.

United Way - Collaboration Committee for Coordination of Nonprofit Organizations - served as a representative from the Friendly Center on collaboration committee to facilitate education of member organization and to minimize overlapping services.

WJYM Weekly Radio Program

Friendship Fundamentals, 1995 - 1999, weekly program airing four times per week focusing on the value of relationships in our lives.

Heavenly Fortunes, 1998; host 15 minute weekly call-in program where listeners may ask questions about financial and investing concepts.

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Toledo City Paper

Common Cents - monthly column focusing on making wise choices in selecting investments.

Church service

First Congregational Church (La Crosse, WI)

Board of Membership 2002-2006; Chairperson, 2004-2005

Men's Group Coordinator, 2002-2006

Bethany Evangelical Free Church (La Crosse, WI)

Instructor for the "Discovering Your Ministry" course involving the use of the Myers-Briggs Type Indicator and a Spiritual Gifts inventory

Promotion Director for the "Faith In Action" (community outreach) committee

Directed and had a lead role in the 1999 Christmas drama

Grace Church (Toledo, OH)

Served as co-leader of "Act of Grace" drama team which presents periodic presentations

Presenter and originator of the "Discover!" series for helping locate areas of service for Church members through conducting a one day seminar which features the Myers-Briggs Type Indicator and a self-developed spiritual gifts inventory.

Community Awards

Twenty Under 40 - Selected as one of the twenty outstanding individuals (from 200 nominations) under 40 years old in the Toledo area for 1998 based on excellence in professional and community service. The award is sponsored by the Toledo Jaycess, Arthur Anderson, Smith Barney, and the *Toledo Business Journal*.

Named as the 1998 **Outstanding Young Educator** for the Toledo area by Twenty Under 40 and subsequently named one of three **Ohio Outstanding Young Educators** by the Ohio Jaycees in March 1999.

Honors

Dean's Merit Awards - One of six professors in the College of Business Administration at the University of Toledo selected for dean's merit awards. Awards were presented in the Fall of 1998 to faculty considered to be in the top 10 percent of faculty in the University.

References

Donald J. Mullineaux
Professor of Finance
University of Kentucky
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Dianna Preece
Professor of Finance
University of Louisville
Louisville, KY 40292
(502) 852-4831

Patricia Hatfield
Professor of Finance
Bradley University
Peoria, IL 61625
(309) 677-3581

Raymond Gorman
Associate Dean/Professor of Finance
Miami University
Oxford, OH 45056
(513) 529-6644