

# The Behavioral Financial Planning **EXPERIENCE**

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in cooperation with the University of Georgia  
Center for Continuing Education & Hotel

## Your Course Instructors



### John Grable, Ph.D., CFP

Dr. Grable teaches and conducts research in the Certified Financial Planner™ Board of Standards Inc. undergraduate and graduate programs at the University of Georgia where he holds an Athletic Association Endowed Professorship. Prior to entering the academic profession, he worked as a pension/benefits administrator and later as a Registered Investment Adviser in an asset management firm.

Dr. Grable served as the founding editor for the Journal of Personal Finance and co-founding editor of the Journal of Financial Therapy. He is currently co-editor of Financial Planning Review. He is best known for his work in the areas of financial risk-tolerance assessment, behavioral financial planning, and evidence-based financial planning. He has been the recipient of numerous research and publication awards and grants and is active in promoting the link between research and financial planning practice where he has published over 150 refereed papers, co-authored three financial planning textbooks, co-authored a financial planning communication book, co-authored a national certification exam study guide, and co-edited a financial planning and counseling scales book. He also writes a quarterly column for the Journal of Financial Service Professionals. Dr. Grable has served on departmental, college, and university tenure and promotion committees during his academic career.



### Kristy Archuleta, Ph.D., LMFT

Dr. Kristy Archuleta is an Associate Professor in one of the nation's premier financial planning programs at the University of Georgia and a Licensed Marriage and Family Therapist. Before joining the faculty at UGA in August 2018, she was an Associate Professor and Program Director of the Personal Financial Planning program at Kansas State University. Her research interests relate to financial therapy, couples and money, and effective mechanisms to improve financial and overall well-being. She is a co-founding board member and Past-President of the Financial Therapy Association, current Editor-in-Chief of the Journal of Financial Therapy, and has co-edited two books: Financial Planning and Scales and Financial Therapy: Theory, Theory, Research, and Practice. She has published numerous scholarly articles and been

interviewed for media outlets such as New York Times, Investor Business Daily, Investment News, Investor Business Daily, CNBC, Glamour, CBS Money Watch, Parade among others. She serves on the Board of Directors for the National Association of Personal Financial Advisors, on the Editorial Boards for Financial Planning Review, Journal of Financial Planning, and Korean Financial Planning Review, and as a Hartford Funds Human Centric Insights Panelist.

Dr. Archuleta is a recipient of the Kansas State University College of Human Ecology Myers-Alford Outstanding Teaching Award and the Oklahoma State University College of Human Sciences Distinguished Alumna Award. Along with co-authors, she has been a recipient of the Association for Financial Counseling and Planning Education's 2019 Research to Practice Outstanding Conference Paper Award and 2014 Outstanding Journal Article Award (Journal of Financial Counseling and Planning) and American Council on Consumer Interests 2016 AARP's Public Policy Institute's Financial Services and the Older Consumer Award.



### **Megan Ford M.S., LMFT**

Ms. Ford is internationally known in the field of financial therapy. Her research focuses on holistic wellness, aspects of financial therapy, and currently, measuring physiological responses of couples in financial therapy. Holistic intervention and collaborative work; clinical development; marriage and family therapy; financial therapy.

### **W. Keith Campbell, Ph.D.**

Dr. Campbell is a Professor of Psychology, and former Department Chair, at the University of Georgia. He is the author of more than 100 scientific articles. His article and books have been referenced by others over 30,000 times. His books include: *The Handbook of Narcissism and Narcissistic Personality Disorder: Theoretical Approaches, Empirical Findings, and Treatments* (with Josh Miller); *The Narcissism Epidemic: Living in the Age of Entitlement* (with Jean Twenge); and *When You Love a Man Who Loves Himself: How to Deal with a One-way Relationship*. His work on narcissism has appeared in *USA Today*, *Time*, and *The New York Times*.



Dr. Campbell has also made numerous radio and television appearances, including the Today Show and NPR's All Things Considered. Dr. Campbell holds a BA from the University of California at Berkeley, an MA from San Diego State University, and a Ph.D. from the University of North Carolina at Chapel Hill. His postdoctoral work was completed at Case Western Reserve University.



### **Swarn Chatterjee, Ph.D.**

Dr. Chatterjee is best known for his research in three areas: performance evaluation across different stages of the financial planning process; examination of the association between financial well-being, welfare dependency, and health among underserved populations; and identification of factors that improve financial decision making among transitioning young adults and the elderly households. He is nationally known for his work in the area of behavioral finance.

### **Lance Palmer, Ph.D., CFP®**

Dr. Palmer does work that seeks to identify effective ways of motivating financial behavior change through brief intervention strategies. He is currently focused on developing brief interventions that are informative, scalable, and can easily be integrated into the income tax preparation process. The design and format of the brief interventions are informed by research findings from behavioral economics and behavior change theory, as well as evidenced-based counseling practices such as Solution-Focused Brief Coaching.



### **Joe Goetz, Ph.D., AFC®**

Dr. Goetz s best known for his work on client-planner communication within the context of financial planning, financial therapy, investment risk tolerance, the fiduciary standard of care, and financial planning pedagogy.



### **Kenneth White, Ph.D.**

Dr. Chatterjee is best known for his research in three areas: performance evaluation across different stages of the financial planning process; examination of the association between financial well-being, welfare dependency, and health among underserved populations; and identification of factors that improve financial decision making among transitioning young adults and the elderly households. He is nationally known for his work in the area of behavioral finance.



### **Ron Sages, Ph.D., CFP®**

Dr. Sages aspires to bring applied research to financial planning practitioners in an effort to provide practical solutions to client-focused challenges. He is currently focusing on Applied Behavioral Finance research surrounding the discipline of estate planning, incorporating behavioral factors associated with probate litigation within traditional and blended families.



### **Charles Chaffin, Ph.D.**

Dr. Chaffin is Director of Academic Initiatives with the CFP Board Center for Financial Planning, including the Academic Research Colloquium; Founding Executive Editor of the new academic journal, Financial Planning Review; editor of the CFP Board Center for Financial Planning Book series; and the program lead of the Columbia University-CFP Board Teaching Program. He is the lead author and editor of the book, Client Psychology, released in 2018.

Dr. Chaffin is a published researcher with a multitude of papers that focus on the cognitive workload of learners in different task settings, reflective practice, and best practices in higher education curriculum and instruction, both within Education as well as within financial planning. He is also editor of the first and second editions of the Financial Planning Competency Handbook and has contributed chapters to a variety of books focused on educational psychology and higher education policy. His educational background has focused on teaching pedagogy, curriculum and instruction, educational and cognitive psychology, learner assessment, and higher education administration. He has taught all levels of learners, from elementary school, baccalaureate, graduate, and doctoral studies through a variety of instructional platforms. Prior to his appointment in the CFP Board Center for Financial Planning, he worked for seven years providing guidance and oversight to the hundreds of CFP Board Registered Programs nationally. He holds a master's degree from the University of Michigan and a Doctorate from the University of Illinois at Urbana-Champaign.

*This 3-day immersive course is supported by the  
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*For more information about The Behavioral Financial Planning Experience program,  
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