

**2007 PROGRAM DIRECTOR'S CONFERENCE  
SEPTEMBER 7-8 2007  
WASHINGTON STATE CONVENTION AND TRADE CENTER  
SEATTLE, WASHINGTON**

**SESSION: #977510**

**RESEARCH AND ACADEMIC JOURNALS**

A panel of representatives from multiple journals will discuss the types of research they would like to see coming from the academic community

FRIDAY, SEPTEMBER 7, 2007  
1:40 PM – 2:20 PM

**PANELIST:**

Dr. Thomas M. Warschauer, CFP<sup>®</sup>, Ph.D.  
San Diego State University  
Department of Finance  
5500 Campanile Drive, SDSU  
San Diego, CA 92182

Dr. Warschauer is Professor of Finance at San Diego State University's College of Business Administration and is Director of SDSU's Personal Financial Planning program. He is also Director of its Center for the Study of Personal Financial Planning. He was a member of the Board of Examiners of the CFP Board of Standards and was recently a member of its Education Task Force. He was founder and first President of the national Academy of Financial Services. The Academy is the nation's preeminent academic organization dealing with individual finance issues.

Early in his career Warschauer practiced fee-based financial planning for fifteen years and was NASD Principal for a regional securities firm in Colorado. He has served as consultant to major financial institutions including Citibank, Prudential Securities and currently Pure Financial.

Warschauer earned his CFP<sup>®</sup> license in the second year it was available. He has been the Academic Editor of the Journal of the Institute of Certified Financial Planners and was Associate Editor of the Financial Services Review. His areas of research include a variety of topics related to mutual funds, personal financial planning and portfolio management. Dr. Warschauer has published articles in both academic and practitioner journals, such as the *Financial Services Review*, the *Financial Review* and the *Journal of the ICFP*. He earned the Certified Financial Planner Board of Standard's 2003 Academic Article Award.

Warschauer holds a Ph.D. in Finance from the University of Colorado at Boulder.

**PANELIST:**

Ms. Maureen Peck  
Journal of Financial Planning  
4100 East Mississippi Avenue, Suite 400  
Denver, CO 80246

Maureen Peck is managing editor of the *Journal of Financial Planning*, a publication geared toward financial planning professionals and owned by the Financial Planning Association<sup>®</sup>. She can be reached at (303) 867-7114 or at [maureen.peck@fpanet.org](mailto:maureen.peck@fpanet.org).

**PANELIST:**

Dr. Stuart Michelson, Ph.D.  
Stetson University  
421 North Woodland Boulevard  
School of Business – Unit 8398  
Deland, FL 32723

Dr. Michelson has been at Stetson University as the Roland and Sarah George Professor of Finance since 2001. Previously he was at the University of Central Florida and Eastern Illinois University. He received his Ph.D. in Finance from the University of Kansas. His primary teaching responsibilities include MBA Advanced Financial Management, Intermediate Financial Management I and II and EMBA Investments. He is editor of the

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**PANELIST:**

Dr. Stuart Michelson, Ph.D. (Continued)

refereed academic journal Financial Services Review. He is a member of the editorial board of several scholarly journals, a board member of Financial Executives International and an active member of the National Association of Corporate Directors. He is a past president of the Academy of Financial Services and is the current president of the Academy of Business Education. Dr. Michelson has published over 40 refereed academic journal research articles. His current research areas include the use of technology in education, mutual funds, analyst's earnings announcements, portfolio risk budgeting, and academic honesty. He currently serves on the Stetson University Finance Committee, faculty representative to the University Board of Trustees, Faculty Senate, University Enrollment Growth Committee, University Benefits Committee, chair of the University Faculty Welfare Committee, chair of the School of Business Promotion and Tenure Committee, and chair of the Faculty Development Committee.

**PANELIST:**

Dr. Ruth Lytton, Ph.D.  
Journal of Personal Finance  
324 Hutcheson Hall – 0401  
Blacksburg, VA 24061-0424

Ruth Lytton serves as Director of the Certified Financial Planner™ Board of Standards, Inc. and the International Association of Registered Financial Consultants registered undergraduate programs at Virginia Tech. In addition to serving as program director, she provides student services (e.g., academic/career advising, internship supervision, and placement) and teaches a variety of courses. Dr. Lytton has received various student association, university, and national professional association awards for her contributions as a teacher, researcher, and career/academic advisor, including the College of Human Resources Certificate of Teaching Excellence, College of Human Resources and Education Excellence in Undergraduate Student Advising Award, and the Virginia Tech Award for Excellence in Career Advising.

Dr. Lytton is an academic member of the Financial Planning Association (FPA), the National Association of Personal Financial Advisors (NAPFA), and the International Association of Registered Financial Consultants (IARFC), for whom she currently serves on the Board of Directors and Vice President. She also serves as an Advisory Editor for the Social Science Research Network's (SSRN) Journal in Behavioral & Experimental Finance and as Editor of the Journal of Personal Finance.

She is co-author, with John Grable and Derek Klock, of The Process of Financial Planning: Developing a Financial Plan (The National Underwriter Co., 2006). The three also have another text under review, and Lytton and Klock have provided ancillaries (print and electronic) for multiple editions of a leading personal finance text.

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**PANELIST:**

Mr. Harold M. Evensky, AIF<sup>®</sup>, CFP<sup>®</sup>

Evensky & Katz

2333 Ponce De Leon Boulevard, Penthouse Suite 1100

Coral Gables, FL 33134

HAROLD EVENSKY, AIF<sup>®</sup>, CFP<sup>®</sup> is President of Evensky & Katz a fee only financial advisory firm based in Coral Gables, Florida. Prior to forming his own company, he served as a Vice President of Investments with major investment banking firms. Mr. Evensky received his Bachelors and Masters degrees from Cornell University.

He has served as Chair of the TIAA-CREF Institute Advisory Board, the International CFP Council, the CFP Board of Governors, the Board of Examiners, and the Board of Appeals and as a member of the National Board of the IAFP and the Charles Schwab Institutional Advisory Board and Council. He is an Adjunct Graduate Faculty at Texas Tech in the Personal Financial Planning Program, a member of the Financial Planning Association, the Academy of Financial Services, the CFA Institute and is an associate member of the American Bar Association. He is currently an Adjunct Graduate Professor at Texas Tech University, the Research Columnist for the *Journal of Financial Planning*, a contributing writer for *Financial Advisor Magazine*, the *Asian Financial Planning Journal* and a member of the Editorial Review Board of the *Journal of Financial Planning*.

Mr. Evensky has been frequently recognized by *Worth* as one of the top 100 Wealth Managers, by *Investment Advisor* as one of the 25 most influential people in the financial planning industry, by *Financial Planning Magazine* as one of five "Movers, Shakers and Decision Makers, The Most Influential People in the Financial Planning Profession," *Investment News* named one of the "25 Power Elite" in the financial services industry and *Accounting Today* has regularly listed him as one the profession's most influential people. In 2002, his paper "Changing Equity Premium Implications for Wealth Management Portfolio Design" won the *Journal of Financial Planning*, "Call for Papers" competition, in 1999, he was awarded the Dow Jones Investment Advisor Portfolio Management Award For Lifetime Achievement and in 2006 he received the Skip Viragh Award.

Mr. Evensky is an internationally recognized speaker on investment and financial planning issues. In addition, he has written for and is quoted frequently in the national press, and is the author of *Wealth Management* (McGraw/Hill) and co-editor of *The Investment Think Tank, Theory, Strategy, and Practice for Advisers* (Bloomberg) and *Retirement Income Redesigned - Master Plans for Distribution* (Bloomberg).