

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

SESSION: #977520

BRIDGING THE GAP – FROM STUDENT TO PRACTITIONER

A panel discussion bridging the information being taught in school with that being used and needed in the workplace

SATURDAY, SEPTEMBER 8, 2007
10:30 AM – 11:20 AM

PANELIST:

Mrs. Kyra Morris, CFP®, EA
Morris Financial Concepts
107 Pitt Street
Mount Pleasant, SC 29464

Mrs. Morris began her career in financial planning in 1983. She obtained the CERTIFIED FINANCIAL PLANNER™ certification in 1986 and began her own business in 1987. Mrs. Morris has enjoyed being part of the creation of a financial planning and wealth awareness practice in Mt. Pleasant, SC. Her strong staff also has a major role. Mrs. Morris was one of the founders of the South Carolina Society for the Institute of Certified Financial Planners in 1985, from 1993-1997 she served in a national position on the board of the Institute of Certified Financial Planners, and from 2000-2004 she served on the Certified Financial Planner Board of Standards, Inc. Board of Governors.

She has received several accolades over the years including: *Dow Jones Investment Advisor Magazine* featured her on the October 1995 cover for her attention to detail when providing tax planning for her clients; *Worth Magazine* has named her as one of the top financial planners in the country four times since 1994; *Bloomberg Wealth Manager* selected her as one of the Top 150 Wealth Managers in June 2001; *Mutual Funds* magazine named her one of the Top 100 Financial Advisors in their September 2002 issue; and *Financial Planning* magazine named her as one of the 5 Financial Planner Mover & Shakers in their Jan 2006 issue.

In 1998, Mrs. Morris helped the Financial Planning Association resurrect the Residency Program for entry-level CERTIFIED FINANCIAL PLANNER™ certificants. From 1998 - 2005 she served a dean of this program. From 2001 until present Mrs. Morris has served on the US TAG for the development of the ISO standard for financial planning. In 2003 she founded The Center for International Training for Financial Planners, LTD. Through this organization she has continued her passion for development and delivery of true financial planning around the world.

PANELIST:

Dr. Joseph W. Goetz, Ph.D.
The University of Georgia
205 Dawson Hall
Athens, GA 30602

Dr. Goetz is an assistant professor in the Family Financial Planning program at The University of Georgia. He teaches the introductory and capstone courses in financial planning as well as a course in financial counseling and behavioral finance. He received his bachelor's degree in psychology from the University of Missouri-Columbia. His educational background also includes two master's degrees from Texas Tech University in the areas of Personal Financial Planning and Psychology, as well as a Ph.D. in Consumer Economics with a specialization in Financial Planning. He conducts research in the areas of risk tolerance, financial counseling, and financial planning pedagogy. Dr. Goetz received the 2007 Dissertation Award from the American Council on Consumer Interests. He is a member of the Financial Planning Association, Academy of Financial Services, and Association for Financial Counseling and Planning.

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PANELIST:

Dr. Vickie L. Hampton, CFP[®], Ph.D.
Texas Tech University
Broadway and Akron
College of Human Sciences, Room 260
Lubbock, TX 79409

Vickie Hampton is the Program Director for the CFP Board-Registered Personal Financial Planning programs at Texas Tech University (TTU). TTU has nine registered programs including undergraduate, masters, Ph.D. degrees in addition to a certificate program. At the master's level, there are three joint programs: JD/MS Personal Financial Planning, MBA/MS Personal Financial Planning, and MS Finance/MS Personal Financial Planning.

Vickie teaches the Personal Financial Planning Capstone class in addition to Retirement Planning and Employee Benefits at the undergraduate and graduate levels. Her research interests include determinants of success on the CFP[®] Certification Examination, financial planning guidelines and benchmarks for measuring financial well being of families, and career development in the financial planning profession. She has contributed to numerous national financial planning textbooks and instructional materials.

Over the past ten years, Vickie has been active on national boards serving on the Certified Financial Planner (CFP) Board of Governors, the CFP Board of Examiners, the Board of Trustees for the American College, and the Academy of Financial Services Board. She chaired the 1999 CFP Board Job Analysis Committee and was on the steering committee for the AFS and CFP Board Model Financial Planning Curriculum Project.

Hampton joined the Texas Tech faculty and the Center for Financial Responsibility in 1999. She received her M.S. and Ph.D. degrees in Family and Consumption Economics at the University of Illinois - Urbana. Before coming to Texas Tech, Dr. Hampton taught and conducted research in personal financial planning at the University of Texas - Austin.

PANELIST:

Dr. Dandan Zhu, Ph.D.
Financial & Investment Management Group
111 Cass Street
Traverse City, MI 49684

Dr. Zhu is a portfolio analyst for FIM Group. She is active in evaluating portfolio performance and conducts extensive research on securities.

Dr. Zhu joined FIM Group Michigan office in July of 2005. She earned her B.A. from The Hague University in the Netherlands. Before joining FIM Group, Dandan attended Texas Tech University obtaining her Master's degree in Finance and Personal Financial Planning and a Ph.D. in Financial Planning. While at Texas Tech Dandan also taught undergraduate asset management courses, along with conducting financial planning seminars.

With her extensive education and experience, Dr. Zhu is often a presenter and writer for industry conferences and publications. She has presented at the Financial Planning Association NexGen conference, the CFP/FPA Director conference and a variety of others.

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PANELIST:

Dr. Dandan Zhu, Ph.D. (Continued)

Dr. Zhu's industry affiliations include the Financial Planning Association, FPA NexGen group, CFA Institute, and Academy of Financial Services. Among her industry association she continues to be on the Board of Directors of American Red Cross Northwest Michigan Chapter and on the membership committee of The Economic Club of Traverse City.