

# FEA

*Financial Education Association*

*26<sup>th</sup> Annual Conference*

*The Historic Menger Hotel  
San Antonio*

*September 18<sup>th</sup>- 20<sup>th</sup>, 2025*

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**Journal of Financial Education  
Advances in Financial Education**

**<https://jfedweb.org/jfedpage.html>**

**Journal of Instructional Techniques in Finance**

**<https://jfcf.org/>**

**Journal of Finance Case Research**

**<https://jfcf.scholasticahq.com/>**

## Table of Contents

Sponsors	2
Outline Schedule	5
At-a-Glance	6
Full Program	8
Thursday	8
Friday	12
Sponsors (again)	20
Awards for 2025	23
Participant Directory	24

## Map of The Historic Menger Hotel

## Preliminary Schedule Notes

Meeting rooms will have high-speed WiFi access for registered attendees. The WiFi server is “University of Houston” and the password is “Uofh@2024”. This program (latest version) is posted in PDF at <https://www.jfedweb.org/>

Screens, projectors, laser pointers and laptops (with Windows 10 or 11) will be provided. One member of each session should serve as the session chair or timekeeper. **Each presenter should bring their presentation on a standard USB drive. We do not have the ability to preload presentations on session laptops. Also, The Menger Hotel does not have the ability to reproduce your session materials, so please bring copies with you.**

On the MiniMap and Schedule, sessions are listed by conference day and time. For example, Session 1.2.1 is the 2<sup>nd</sup> Thursday morning slot, in the first room on the left side of the minimap (in this case, Ballroom A). Session 1.2.3 would be in Ballroom C, etc. A full program will be available shortly before the conference.

**Financial Education Association (FEA) Annual Conference**

**The Historic Menger Hotel, San Antonio, Texas**

**September 18-20th, 2025**

Meeting rooms will have high-speed WiFi access for registered attendees. Screens, projectors and laptops (with Windows 10 or 11) will be provided. One member of each session will be asked to serve as session chair. Each presenter should bring printed copies of their paper along with materials for the presentation on a USB disk.

**Thursday 9/18**

**Continental Breakfast: 8 – 10 AM**

**Location: Ballroom Lobby**

Session 1.1: 8:30 - 10 AM

*Break*

Session 1.2: 10:30 – Noon

**Lunch: Cold cuts, soda, water**

**Location: Ballroom Lobby**

Session 1.3: 1 – 2:30 PM

*Break*

Session 1.4: 3 – 4:30 PM

**Reception: 5 - 7 PM**

**Location: Ballroom Lobby**

**Friday 9/19**

**Continental Breakfast: 8 – 9:30 AM**

**Location: Ballroom Lobby**

Session 2.1: 8:30 -10 AM

*Break*

Session 2.2: 10:30 – Noon

**Lunch: Deli Luncheon w/keynote**

**Location: *Minuet Room***

Session 2.3: 1 – 2:30 PM

*Break*

Session 2.4: 3 – 4:30 PM

**Reception: 5 - 7 PM**

**Location: Ballroom Lobby**

**Saturday 9/20**

**Continental Breakfast: 7:45 – 11 AM**

**Location: Ballroom Lobby**

## Financial Education Association 2025 Annual Conference September 18-20, 2025

\*\*\*\*\*All times are in Central Time (EST minus 1)\*\*\*\*\*

### Thursday, September 18

Location / Time	<b>1. Ballroom A</b>	<b>2. Ballroom B</b>	<b>3. Ballroom C</b>	<b>4. Cavalier</b>
<b>Track 1.1 8:30 – 10:00</b>			<b>Roundtable/Session: Teaching “Intro to Finance”</b>	
<b>Track 1.2 10:30 - Noon</b>	<b>Teaching Techniques I</b>	<b>Technical Agility I</b>	<b>RT: Academic Integrity, Proctoring and AI</b>	<b>Artificial Intelligence I</b>
<b>Lunch 12-1</b>	<b>Sandwiches Ballroom Lobby</b>			
<b>Track 1.3 1:00 – 2:30</b>	<b>Panel: Student- Managed Funds (SMIFs)</b>		<b>Cases in Finance</b>	<b>RT: Developmental Needs in the Finance Classroom</b>
<b>Track 1.4 3:00 – 4:30</b>	<b><i>CFA Institute (sponsor session)</i></b>	<b>Artificial Intelligence II</b>	<b>Curriculum &amp; Accreditation I</b>	<b>Teaching Innovations I</b>

**Reception 5 – 7 in Ballroom Lobby**

## Friday, September 19

<b>Location / Time</b>	<b>1. Ballroom A</b>	<b>2. Ballroom B</b>	<b>3. Ballroom C</b>	<b>4. Cavalier</b>
<b>Track 2.1 8:30 – 10:00</b>	<b>Technical Agility II</b>	<b>Generative AI, Instruction &amp; Consequences</b>	<b><i>Stock Trak trading simulation demonstration</i></b>	<b>Curriculum &amp; Accreditation II</b>
<b>Track 2.2 10:30 - Noon</b>	<b><i>ExPrep demonstration (sponsor session)</i></b>	<b>Teaching Techniques II</b>	<b><i>Stock Trak trading simulation demonstration</i></b>	<b>Artificial Intelligence III</b>
<b>Lunch 12-1</b>	<b>Minuet Room: Our Usual Buffet Lunch Awards &amp; Recognition</b>  <b>Keynote Speakers Rob Langrick, CFA Institute Brandon Eng, ExcelPreparation.com (ExPrep)</b>			
<b>Track 2.3 1:00 – 2:30</b>	<b><i>CFA Institute (sponsor session)</i></b>	<b>Online Instruction I</b>		<b>Panel: Meet the Editors</b>
<b>Track 2.4 3:00 - 4:30</b>	<b>Teaching Innovations II</b>		<b>FinTech I</b>	<b>RT: Case Teaching &amp; Publishing</b>

Reception 5 – 7 in Ballroom Lobby

\*\*\*\*\*All times are in Central Time (EST minus 1)\*\*\*\*\*

Saturday AM: Continental Breakfast at 8:30, first come first served

**THURSDAY SEPTEMBER 18 8:30 AM**

**Session 1.1.3 Ballroom C:**

**Panel/Session: Teaching the "Intro to Finance" Course**

Timothy Michael, University of Houston - Clear Lake, *michael@uhcl.edu*  
Howard Keen, Temple University  
Mary Funck, Sam Houston State University

**Overcoming Crickets in a Large Section of Introductory Corporate Finance:  
Encouraging student engagement**

Howard Keen, Temple University, *hkeen@temple.edu*

**The "Introduction to Finance" Course: A survey of instructors**

Timothy Michael, University of Houston - Clear Lake, *michael@uhcl.edu*  
Mary Funck, Sam Houston State University  
Howard Keen, Temple University

**10:30 AM**

**Session 1.2.1 Ballroom A:**

**Teaching Techniques I**

**Dukes Around the World: A reflection on experiential learning**

Jody Jones, Abilene Christian University, *jxj16c@acu.edu*  
Olivia Crist, Clarisa Macdonald, Nick Schott, Ella Kate Siewert, Rachel Wilson &  
Brittany Deeg, Abilene Christian University

**How Men and Women Invest Differently**

Rick Hedderick, Penn State Erie, The Behrend College, *rph132@psu.edu*

**Assessment of Student-Managed Investment Programs: Are they mutual funds or  
pedagogical devices?**

Larry Belcher, University of Indianapolis, *belcherl@uindy.edu*  
Jody Jones, Abilene Christian University

**1.2.2 Ballroom B:**

**Technical Agility in Finance & Accounting I**

**~~Perceived Effectiveness of Finance Simulations and Student Dispositions~~**

~~Fred Dewald, University of Mississippi, *fpdewald@olemiss.edu*  
Brain VanderSchee, Indiana University~~



**Demonstrating and Visualising Portfolio Management Using Excel**

Yingtong Dai, University of Bristol, [yingtong.dai@bristol.ac.uk](mailto:yingtong.dai@bristol.ac.uk)  
Jinlin Li, University of Exeter

**Yield Curve Estimation: Implementing the Svensson Model in Excel**

Yingtong Dai, University of Bristol, [yingtong.dai@bristol.ac.uk](mailto:yingtong.dai@bristol.ac.uk)  
Jinlin Li, University of Exeter

**1.2.3 Ballroom C:**

**Roundtable: Academic Integrity, Proctoring and Artificial Intelligence**

Timothy Michael, University of Houston - Clear Lake, [michael@uhcl.edu](mailto:michael@uhcl.edu)  
Howard Keen, Temple University  
Melissa Williams, University of Houston - Clear Lake

**1.2.4 Cavalier:**

**Artificial Intelligence I**

**Meet Abigail Irene (AI), My Assistant Replacement**

Tonya Blocker, Sam Houston State University, [tjb094@shsu.edu](mailto:tjb094@shsu.edu)  
Kurt Jesswein, Sam Houston State University  
Mary Funck, Sam Houston State University

**Enhancing Financial Analysis and Problem Solving - Integrating AI in a Finance Capstone Class**

Diana Tempski, University of Wisconsin - La Crosse, [dtempski@uwlax.edu](mailto:dtempksi@uwlax.edu)

**Artificial Intelligence vs. Wall St. Analysts and a student-managed fund**

Tim Krause, Penn State Behrend, [tak25@psu.edu](mailto:tak25@psu.edu)  
Phil Stuczyinski, Penn State Behrend

**NOON LUNCH**

**BALLROOM LOBBY**

**1 PM**

**Session 1.3.1 Ballroom A:**

**Panel Discussion: Student-Managed Investment Funds (SMIF)**

Larry Belcher, University of Indianapolis, [belcherl@uindy.edu](mailto:belcherl@uindy.edu)  
Jody Jones, Abilene Christian University  
Rob Langrick, CFA Institute

**1.3.3 Ballroom C:  
Cases in Finance**

**Texas Financial Advisory: Trust and the cost of deception**

Pablo Calafiore, Texas A&M University - San Antonio, *pablo.calafiore@tamusa.edu*

**Discussion/Case Study: Green and Sustainable Electricity Solution on the examples of Swedish firms**

Elena Skouratova, Concordia University of Texas, *elena.skouratova@concordia.edu*

**A Comparison of Written Case Study Assessments versus Multiple-choice Case Study Assessments: A preliminary analysis**

Tamara Gillis, Elizabethtown College, *gillistl@etown.edu*

**1.3.4 Cavalier:**

**Roundtable/Session: Developmental Needs in Finance & Accounting Instruction**

Timothy Michael, University of Houston - Clear Lake, *michael@uhcl.edu*

Melissa Williams, University of Houston - Clear Lake

Howard Keen, Temple University

**Using Excel in Financial Statements Analysis: An example**

Timothy Michael, University of Houston - Clear Lake, *michael@uhcl.edu*

Melissa Williams, University of Houston – Clear Lake

**3 PM**

**Session 1.4.1 Ballroom A:**

**Sponsor Session: The CFA Designation**

Rob Langrick, CFA Institute, *rob.langrick@cfainstitute.org*

**1.4.2 Ballroom B:**

**Artificial Intelligence II**

**Student Perceptions of AI: Attitudes and usefulness**

Michael Geier, Wingate University, *migeier@wingate.edu*

Lisa Schwartz, Wingate University

**From Prompts to Profits: Leveraging AI to transform Financial Education and empower responsible investment decisions**

Nichole Castater, Florida Atlantic University, [ncastater@fau.edu](mailto:ncastater@fau.edu)

Mehran Basiratmand, Florida Atlantic University

**Integrating Generative AI into Course Assignments: Embracing AI as an analytic tool versus allowing it to threaten the learning process**

Caroline Crawford, University of Houston - Clear Lake, [crawford@uhcl.edu](mailto:crawford@uhcl.edu)

**1.4.3 Ballroom C:  
Curriculum & Accreditation I**

**Packing the Pipeline: A structured approach to upskilling and diversifying student investment analysts**

Gina Nicolosi, Northern Illinois University, [gnicolos@niu.edu](mailto:gnicolos@niu.edu)

**Applying Microcredentials as a Method of Teaching and Assessment in Financial Education**

Jonathan Stewart, Abilene Christian University, [stewartjo@acu.edu](mailto:stewartjo@acu.edu)

Jody Jones, Abilene Christian University

**Exploring the Impact of Optional Synchronous Sessions in Asynchronous Learning**

Rasha Ashraf, Georgia State University, [rashraf@gsu.edu](mailto:rashraf@gsu.edu)

Milind Shrikhande, Georgia State University

**1.4.4 Cavalier:  
Teaching Innovations I**

**Transforming Finance Education with Excel + AI: 20 Use Cases to build job-ready skills**

Michael (Mike) Hollander, Sam Houston State University, [mgh035@shsu.edu](mailto:mgh035@shsu.edu)

**The Riddle, Mystery, and Enigma of Cash Flow Statements: A review of financial statement articulation**

Kurt Jesswein, Sam Houston State University, [jesswein@shsu.edu](mailto:jesswein@shsu.edu)

**FRIDAY SEPTEMBER 19 8:30 AM**

**Session 2.1.1 Ballroom A:**

**Technical Agility in Finance & Accounting II**

**The Treatment of Debt in WACC Calculations in the Airline Industry: Evidence from equity research analysts**

Michael Gorman, Sacred Heart University, *gormanm6@sacredheart.edu*

Bridget Lyons, Sacred Heart University

Robert Langrick, CFA Institute

**DenseFlow, Inc.: Capital budgeting cash flow estimate exercise using Monte Carlo Simulation**

Dan Salandro, Virginia Commonwealth University, *dpsaland@vcu.edu*

**Excel-based finance pedagogy for entrepreneurial students**

Steve Johnson, Sam Houston State University, *sjj008@shsu.edu*

Mary Funck, Sam Houston State University

**2.1.2 Ballroom B:**

**Roundtable: Generative Artificial Intelligence, Instruction and Consequences**

Valeria Martinez, Fairfield University, *vmartinez@fairfield.edu*

Howard Keen, Temple University

Timothy Michael, University of Houston - Clear Lake

Melissa Williams, University of Houston - Clear Lake

**2.1.3 Ballroom C**

**Panel: StockTrak presentation**

Mark Brookshire, StockTrak.com, *Mark@stocktrak.com*

**2.1.4 Cavalier:**

**Curriculum & Accreditation II**

**Small Business Schools and Choosing an Accreditation Path**

Joann Fredrickson, Bemidji State University, *Joann.Fredrickson@bemidjistate.edu*

Lisa Schwartz, Wingate University

**An Alternative Test Method**

Karen Sherrill, Sam Houston State University, *kesherrill@shsu.edu*

**International Capital Budgeting as an Integrative Capstone in Undergraduate  
International Finance: An engaging pedagogical approach**

Amanda Olsen, Wofford College, [olsenam@wofford.edu](mailto:olsenam@wofford.edu)

Russ Sandifer, Wofford College

**10:30 AM**

**Session 2.2.1 Ballroom A:**

**Panel: ExPrep presentation**

Brandon Eng, ExPrep.com, [beng@excelpreparation.com](mailto:beng@excelpreparation.com)

**2.2.2 Ballroom B:**

**Teaching Techniques II**

**From Classroom to RIA: Leveraging financial education to peer-to-peer program to shape  
the next-generation of financial planners**

Ishuan Li Simonson, Minnesota State University Mankato, [ishuan.li@mnsu.edu](mailto:ishuan.li@mnsu.edu)

Daniel Hiebert, Minnesota State University Mankato

**Socioeconomic Determinants of Financial Literacy, Financial Wellbeing and Financial  
Skills: Evidence from Robeson County, North Carolina**

Xinyan Shi, UNC Pembroke, [yan.shi@uncp.edu](mailto:yan.shi@uncp.edu)

Ishuan Li Simonson, Minnesota State University, Mankato

Abdullah Noman, UNC Pembroke

**Perceived vs. Actual Mastery of Quantitative Reasoning Skill in the Introductory Finance  
Course**

Christina Zhang, California State University, Monterey Bay, [czhang@csumb.edu](mailto:czhang@csumb.edu)

**2.2.3 Ballroom C:**

**Panel: StockTrak presentation**

Mark Brookshire, StockTrak.com, [Mark@stocktrak.com](mailto:Mark@stocktrak.com)

**2.2.4 Cavalier:**

**Artificial Intelligence III**

**Student Perceptions of AI: Academic integrity**

Michael Geier, Wingate University, [migeier@wingate.edu](mailto:migeier@wingate.edu)

Lisa Schwartz, Wingate University

**Rethinking Business Education: Integrating Generative AI through a digital Hierarchy of Needs Framework**

Jocelyn Evans, University of Missouri-Kansas City - Volker Campus,  
*jocelyn.evans@umkc.edu*  
Timothy Jones, Xavier University  
Phyllis Keys, Morgan State University

**Guiding Student Thinking with AI: A case study of FinBot in introductory finance education**

Huan Kuang, Bryant University, *hkuang@bryant.edu*  
Maura Dowling, Bryant University  
David Gannon, Bryant University  
Michelle Munoz, Bryant University

**NOON LUNCH: Awards, Recognition and Keynotes**

**MINUET ROOM**

**Rob Langrick, Chartered Financial Analyst Institute**  
**Brandon Eng, ExcelPreparation.com (ExPrep)**

**1 PM**

**Session 2.3.1 Ballroom A**

**Panel: The CFA Designation**

Rob Langrick, CFA Institute, *rob.langrick@cfainstitute.org*

**2.3.2 Ballroom B:**

**Online Instruction I**

**Student Perceptions and Best Practices in Online Business Education**

Steve Nenninger, Sam Houston State University, *san009@shsu.edu*  
Mary Funck, Sam Houston State University

**Not Just Doing, but Doing Something Meaningful: An Experiential Learning in Investment class**

Joon-Young Song, University of Findlay, *song@findlay.edu*

**2.3.4 Cavalier:**

**Panel: Meet the Editors**

Timothy Michael, University of Houston - Clear Lake, *michael@uhcl.edu*

Rasha Ashraf, Georgia State University  
Milind Shrikhande, Georgia State University  
Mary Funck, Sam Houston State University

**3 PM**

**Session 2.4.1 Ballroom A:  
Teaching Innovations II**

**Using Bloomberg to Examine the Reaction of REITs to Equity Market Volatility**

Travis Jones, Florida Gulf Coast University, *tljones@fgcu.edu*  
Daniel Huerta, Florida Gulf Coast University

**Notes on Exams: Valuable study aid or unsteady crutch?**

James Turner, Weber State University, *JamesTurner@weber.edu*

**Integrating FINRA's Securities Industry Essentials (SIE) Content into a Finance Program**

Eric Fricke, California State University, East Bay, *eric.fricke@csueastbay.edu*

**2.4.3 Ballroom C:  
FinTech I**

**Teaching the FinTech Foundations Course: A research-based approach**

Heather Sorcha, Michigan Technological University, *sorcha@mtu.edu*

**Use of Bloomberg Excel add-in formulas to download data for research and teaching**

Chee Ng, Siena College, *cng@siena.edu*

**2.4.4 Cavalier  
Roundtable/Session: Case Teaching and Publishing**

Timothy Michael, University of Houston - Clear Lake, *michael@uhcl.edu*  
Melissa Williams, University of Houston - Clear Lake

**Case-writing: Two examples**

Melissa Williams, University of Houston - Clear Lake, *williamsmeli@uhcl.edu*  
Timothy Michael, University of Houston - Clear Lake

**SATURDAY SEPTEMBER 20 7:45 AM**

**Continental Breakfast (first come, first served)**

**BALLROOM LOBBY**

**Be sure to support our academic partners, again**



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CFA Charterholders

**80%** of CFA Charterholders say  
the CFA Program boosted their career





## Spreadsheet Grading Made Easy

Our ExPrep Grader Platform is an automated grading solution for educators using Microsoft Excel in the classroom.



ExPrep is honored to join the Financial Education Association at the 2025 Annual Conference.

- ✓ Ability to customize the grading criteria and feedback for all Excel based assignments.
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## MICROSOFT EXCEL COLLEGIATE CHALLENGE

### The Microsoft Excel Collegiate Challenge is a **FREE** program

designed for college and university students to enhance their Excel skills through engaging challenges and competitions. It offers a platform to tackle real-world scenarios, making learning practical and enjoyable. We invite educators to participate through the College Ambassador Program, where educators integrate MECC into their courses or extracurricular activities. Join a community of educators dedicated to fostering digital literacy and Excel-lence among students, empowering them for success.



SCAN ME

## BECOME A COLLEGE AMBASSADOR

### ZERO COSTS TO STUDENTS

MECC offers free access to top-notch training resources, ensuring all students can enhance their Excel skills and succeed in their studies and careers.

### MINIMAL EFFORT, MAXIMUM IMPACT

As a College Ambassador, MECC takes care of everything, offering full support and resources to seamlessly integrate into your curriculum or student activities without added workload.

### INFORMATIONAL MATERIALS

Access MECC's informational materials to easily share program details with colleagues and student organizations. These materials streamline communication and promote widespread participation in MECC activities.

### SHARPEN YOUR STUDENTS' EXCEL SKILLS

Excel is essential across industries, making it a valuable skill in today's job market. MECC helps students excel in tasks like data analysis and process automation.

### EXCLUSIVE INSIGHTS

Use detailed reports from MECC to gain insights into student performance and engagement. Award class (or extra) credit for MECC participation and identify top performing students.

### EXCITING COMPETITIONS

Engage your students in challenges and Excel Esports competitions that lead to the exhilarating in-person MECC Championships in Las Vegas, where they compete individually and in teams. The MECC Championships are part of a larger Excel event, The Active Cell Training Camp, where students can learn from industry experts and network with the community.



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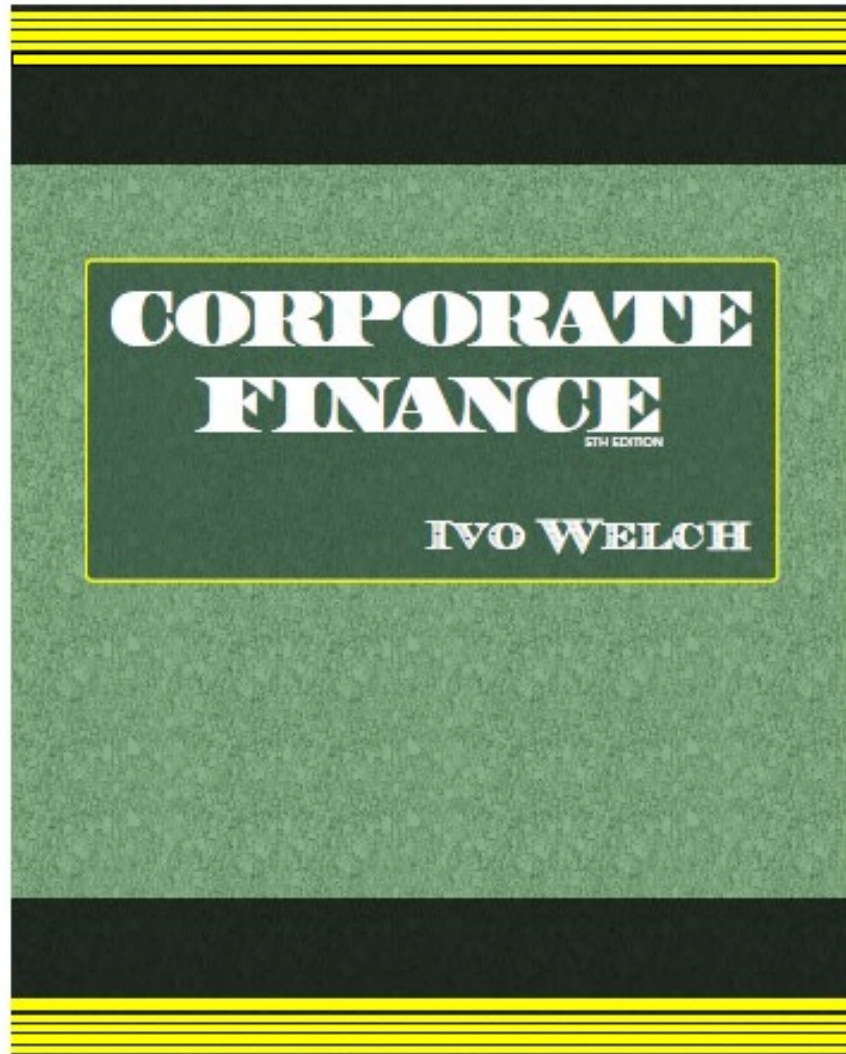
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<https://www.amazon.com/Corporate-Finance-Ivo-Welch/dp/0984004904/>

## **2025 Financial Education Association Awards**

**The Jean L. Heck  
Lifetime Achievement Award  
for  
Excellence in Financial Education**

Mary Funck

Howard Keen

**Outstanding Leadership in Financial Education**

Valeria Martinez

**Best Paper  
Pedagogy in Financial Education**

**Best Paper  
Research in Financial Education**

## FEA Annual Meeting 2025

Participant	Participant Email Address	Session	Affiliation	
Rasha	Ashraf	rashraf@gsu.edu	2.3.2	Georgia State University
			2.3.4	
Mehran	Basiratmand	mehran@fau.edu	1.4.2	Florida Atlantic University
Larry	Belcher	belcherl@uindy.edu	1.2.1	University of Indianapolis
			1.3.1	
Tonya	Blocker	tjb094@shsu.edu	1.2.4	Sam Houston State University
Mark	Brookshire	Mark@stocktrak.com	2.1.3	StockTrak.com
			2.2.3	
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Olivia	Crist		1.2.1	Abilene Christian University
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			1.2.4	
			2.1.1	
			2.3.2	
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Michael	Geier	migeier@wingate.edu	1.4.2	Wingate University
			2.2.4	
Tamara	Gillis	gillistl@etown.edu	1.3.3	Elizabethtown College
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Rick	Hedderick	rph132@psu.edu	1.2.1	Penn State
Daniel	Hiebert	daniel.hiebert@mnsu.edu	2.2.2	Minnesota State University Mankato
Michael (Mike)	Hollander	mgh035@shsu.edu	1.4.4	Sam Houston State University
Daniel	Huerta	dhuerta@fgcu.edu	2.4.1	Florida Gulf Coast University
Kurt	Jesswein	jesswein@shsu.edu	1.4.4	Sam Houston State University
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