



Jerry L. Stevens, University of Richmond

2019 Winner

The

Jean L. Heck

Lifetime Achievement Award

for

Excellence in Financial Education

This award is presented annually to educators who have distinguished themselves over a lifetime of teaching and service as college educators in the field of Financial Management. It is named for the founding Executive Director of FEA, Jean Louis Heck, who gave his best to his students and peers at every opportunity and who showed us how to learn and lead together. Jean's commitment to his profession, students and friends is reflected in this award.

Dr. Stevens was a founding member of both Financial Education Association and Academy of Business Education, and has served in various capacities for both organizations over the past two decades. When he was nominated in 2019, the committee felt that he was the obvious choice to receive this award in its second year. He has been a very important part of our FEA family over the years as a friend and mentor.

From his [biography](#) at University of Richmond:

Jerry L. Stevens retired in 2020 after 33 years as a Professor of Finance at the Robins School of Business. He remains active as an educational consultant and speaker for the Certified Risk Management (CRM) and Chartered Financial Analyst (CFA) professional certification seminars. Jerry was a founding member of the Vantage Consulting Group in 1982 where he now serves as

the group's Chief Economist and Senior Consultant. He is the author of the Vantage Quarterly Market Summary and Outlook and leads a quarterly planning session on the firm's top-down approach to client fund positions.

He is an active member of the advisory board for the Student Managed Investment Fund (SMIF) at the Robins School and recently created a multidisciplinary investment group of Richmond students who trade exchange traded funds (ETFs). His work with ETFs has been published in the Journal of Trading and appears as a chapter in a book on student investment funds. Jerry regularly accompanies finance students on visits to New York City and maintains relationships with former students and alumni groups.

Jerry received his M.S. (1977) and Ph.D. in economics (1980) from the University of Illinois. During his academic career, Jerry held a number of endowed chairs, won numerous teaching and service awards, and served as an editor or associate editor for several journals. He has over 50 publications in refereed research journals to include the American Economic Review; Journal of Portfolio Management; Financial Management; Journal of Accounting, Auditing, and Finance; Financial Services Review; Journal of Financial Education, Journal of Investment Consulting; and the Journal of Financial Planning.