

Final Report on the Faculty Professional Development Grant

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R.I.S.E. Global Strategic Partners Conference

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In February 2009, I was awarded a faculty development to cover expenses associated with attending the R.I.S.E Global Strategic Partners Conference in Dayton, Ohio.

Restatement of Project

The purpose of this trip was two-fold. First, I was asked to teach FIN 3040 and FIN 4023 when Dr. Joe Moore retired and attending this conference allowed me to get up to date information regarding the curriculum and topics covered in investments courses. Secondly, two universities in Dayton have trading rooms similar to the one in the new ATU building. We believed it would be beneficial for a Tech faculty member to see how they are utilized.

Brief Review of Process:

Travel to Dayton, Ohio, Wednesday , March 25, 2009.

Attend Redefining Investment Strategy Education Conference (brochure attached) March 26-28, 2009.

Return to Russellville, Saturday, March 28, 2009.

The original proposal indicated I would fly to Dayton. As it worked out, we reserved a university van and I travelled with students and Dr. Joe Moore. Dr. Moore had some blood clots in his leg earlier in the spring semester so I wanted to be available to help drive the van, and it helped reduce the cost per student since my travel funds helped pay for the van.

Summary

I travelled to the conference, attended many interesting seminars on the state of financial education, met faculty members at schools already utilizing a trading lab, and saw the presentations of student portfolio competition teams. This conference really is an impressive collection of financial policy makers and corporate leaders.

Upon my return I discussed the trading lab with Dr. Carr and Dr. Mason since Dr. Tyler had already announced his upcoming retirement. Once Dr. Bashaw was named as Dean for the fall 2010 semester he was also informed of the possibilities of student portfolio competition and financial trading labs. Much of the information I saw was incorporated into lectures and assignments given in FIN 3043 and FIN 4023 when I taught them during the 2009-2010 and 2010-2011 academic years.

Conclusion and Results

At this time ATU does not have the resources to fund a portfolio competition, but we hope to in the future.

Much of the research highlighted at the seminar measures the importance of financial literacy and financial education programs, particularly among college undergrads. We are offering FIN 2013 this fall and hope to offer it annually on an on-going basis.