**Joseph W. Goetz, Ph.D.**
*Academic Vita*

## ACADEMIC HISTORY

| | | | |
|---|---|---|---|
| Present Rank: | Associate Professor | | |
| Time Assignments: | 37.5% Teaching, 37.5% Research | | |
| Tenure Status: | Tenured | | |
| Graduate Faculty: | Since 2006 | | |
| Academic Degrees: | Doctor of Philosophy<br>*Emphasis: Consumer Economics & Financial Planning*<br>*Dissertation: A Five Nation Examination of Financial Risk Tolerance* | Texas Tech University | 2006 |
| | Master of Science<br>*Emphasis: Personal Financial Planning* | Texas Tech University | 2003 |
| | Master of Arts<br>*Emphasis: Counseling Psychology & Financial Counseling* | Texas Tech University | 2003 |
| | Bachelor of Arts<br>*Major: Psychology*<br>*Honor's Thesis: The Tear and Repair Process in the Working Alliance* | University of Missouri | 1996 |

## ACADEMIC POSITIONS AND RELATED PROFESSIONAL WORK

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|---|---|
| 2014-present | Executive Board Member and Treasurer, *The ARK United Outreach Center* |
| 2012-present<br>(2006-2011) | Associate Professor of Financial Planning<br>Assistant Professor<br>*Department of Financial Planning, Housing and Consumer Economics*<br>University of Georgia |
| 2010-present | Co-Founder, Clinical Supervisor, and Advisory Board Member<br>*The ASPIRE Clinic, College of Family and Consumer Sciences*<br>University of Georgia |
| 2006-present | Co-Founder, Principal<br>*Elwood & Goetz Wealth Advisory Group, LLC*<br>*(Provided 14 internships and 6 full-time jobs to UGA students)* |
| 2010-2014 | Founding Board Member (2010), President (2013)<br>*Financial Therapy Association* |
| 2009-2012 | Program Director, Financial Planning Program<br>*Department of Housing and Consumer Economics, University of Georgia*<br>(Co-founded CFP Board-Registered master's and doctoral degree programs) |
| 2002-2005 | Graduate Teaching Instructor & Assistant Director of Red to Black™<br>*Division of Personal Financial Planning, Texas Tech University* |

## SELECT AWARDS & RECOGNITIONS

*University of Georgia*

- UGA Teaching Academy, Class of 2013
- Financial Counselor of the Year, Association of Financial Planning and Education (AFCPE), 2013
- Richard B. Russell Excellence in Teaching Award, 2012
- Team Advisor, NAGDCA Retirement Knowledge Student Quiz Bowl - 1st Place Nationally, 2012
- Advisor of the Year, College of Family and Consumer Sciences, 2010
- Service-Learning Fellow, 2009-2010
- Lilly Teaching Fellow, 2008-2010
- Team Advisor, Ameriprise Financial Planning Student Invitational® - 2nd Place Nationally, 2008
- Robert O. Herrmann Outstanding Dissertation Award, American Council on Consumer Interests, 2007

*Texas Tech University*

- Graduate Chancellor's Fellowship, Graduate School
- Health & Social Services Fellowship, Graduate School
- Advisor of the Year Award, Residence Hall Association

*University of Missouri-Columbia*

- Mystical 7 *(Honorary, overseen by the chancellor, "recognizing the top seven seniors passing through the university each year")*
- Student Diversity Enhancement Award *(One student selected per year),* Office of the Provost
- Carrie Franke Award for Student Leadership *(Two-year recipient)*, Missouri Students Association

## PUBLICATIONS

*Peer-Reviewed Journal Articles*

**Goetz, J.** (under review). A five-nation examination of investment risk tolerance.

Degallio, L., Palmer, L., **Goetz, J.** (in press). A Case Study Demonstrating the Use of Appreciative Inquiry in a Financial Coaching Program. *Family & Consumer Sciences Research Journal.*

Ross, D. B., Gale, J., & **Goetz, J**. (2016). Ethical Considerations in Financial Therapy. *Journal of Financial Therapy.*

McCoy, M., Ross, D. B., & **Goetz, J.** (2014). Narrative Financial Therapy: Integrating a financial planning approach with therapeutic theory. *Journal of Financial Therapy, 4*(2), 22-42.

**Goetz, J.,** Chatterjee, S., & Cude, B. (2014). Suitability versus fiduciary standard: The perceived impacts of changing one's standard of care. *Journal of Financial Planning, 27*(2), 20-23.

Gale, J., **Goetz, J.,** & Britt, S. (2012). Ten considerations for the development of the financial therapy profession. *Journal of Financial Therapy, 3*(2), 1-18.

Chatterjee, S., Palmer, L., & **Goetz, J**. (2012). Individual wealth accumulation: Why does dining together as a family matter? *Applied Economics Research Bulletin*, *8*(1), 1-22.

**Goetz, J.**, Cude, B., Nielsen, R., Chatterjee, S., & Mimura, Y. (2011). College-based personal finance education: Student interest in three delivery methods. *Journal of Financial Counseling and Planning, 22*(1), 27-42.

Kim, J., Gale, J., **Goetz, J.**, & Bermúdez, J. M. (2011). Relational financial therapy: An innovative and collaborative treatment approach. *Contemporary Family Therapy, 33*(3), 229-241.

**Goetz, J.**, Durband, D. B., Halley, R., & Davis, K. (2011). A peer-based financial planning and education service program: An innovative pedagogic approach. *Journal of College Teaching & Learning, 8*(4), 7-14.

**Goetz, J.**, Zhu, D., Hampton, V., Chatterjee, S., & Salter, J. (2011). Integration of professional certification examinations with the financial planning curriculum: Increasing efficiency, motivation, and professional success. *American Journal of Business Education, 4*(3), 35-46.

Chatterjee, S., Palmer, L., & **Goetz, J.** (2011). Sustainable withdrawal rates of retirees: Is the recent economic crisis a cause for concern? *International Journal of Economics and Finance, 3*(1), 17-22.

**Goetz, J.**, Gilliam, J., & Grable, J. (2011). Inter-observer risk-tolerance agreement between husbands and wives. *Journal of Business and Economics Research. 9*(2), 17-26.

Palmer, L., **Goetz, J.**, & Harness, N. J. (2010). Raising consumers' awareness of savings opportunities: The Saver's Credit and tax season. *Journal of Consumer Education, 7*, 87-101.

Annis, P. M., Palmer, L., & **Goetz, J**. (2010). Service-learning in the financial planning curriculum: Expanding access to the community. *Journal of Family and Consumer Sciences, 102*(3), 16-21.

Palmer, L., Bliss, D., **Goetz, J.**, & Moorman, D. (2010). Helping undergraduates discover the value of a dollar through self-monitoring. *American Journal of Business Education, 3*(7), 103-108.

Roszkowski, M., & **Goetz, J.** (2010). The relationship between salary and perceived financial comfort among graduates of a developmental education program. *Research and Teaching in Developmental Education, 26*(1), 10-15.

Palmer, L., Bliss, D., **Goetz, J.**, & Moorman, D. (2010). Improving financial awareness among college students: Assessment of a financial management project. *College Student Journal, 44*(3), 659-676.

Green-Pimentel, L., **Goetz, J.**, Gale, J., & Bermúdez, M. (2009). An innovative collaboration between financial and relationship experts: Counselors' perspectives and opportunities for Extension professionals. *The Forum for Family and Consumer Issues, 14*(2). Available online at http://ncsu.edu/ffci/publications/2009/v14-n2-2009-summer-fall/index-v14-n2-September-2009.php

Palmer, L., **Goetz, J.**, & Chatterjee, S. (2009). Service-learning for financial planning students: Making a difference now and for years to come. *Financial Services Review, 18*(2), 157-175.

Chatterjee, S., **Goetz, J.**, & Palmer, L. (2009). An examination of subprime short-term borrowing in the United States. *Global Journal of Business Research, 3*(2), 1-8.

**Goetz, J.**, & James, R. (2008). Human choice and the emerging field of neuroeconomics: A review of brain science for the financial planner. *Journal of Personal Finance, 6*(2), 13-36.

Gilliam, J., **Goetz, J.**, & Hampton, V. (2008). Spousal differences in financial risk tolerance. *Financial Counseling and Planning, 19*(1), 3-11.

**Goetz, J.**, Mimura, Y., Desai, M., & Cude, B. (2008). HOPE or No-HOPE: Merit-based college scholarship status and financial behaviors among college students. *Financial Counseling and Planning, 19*(1), 12-19.

Palmer, L., **Goetz, J.**, & Moorman, D. (2008). Development of a multi-item spending behavior assessment: An application of the Transtheoretical Model of Change. *Journal of Consumer Education, 25,* 17-31.

**Goetz, J.**, & Bagwell, D. (2006). Difficult questions from clients: How practitioners respond. *Journal of Personal Finance, 5*(1), 16-25.

**Goetz, J.**, Tombs, J., & Hampton, V. (2005). Easing the college student's transition into the financial planning profession. *Financial Services Review, 14*(3), 231-251.

*Invited Journal Article*

Gale, J., **Goetz, J.**, & Bermúdez, M. (2009). Relational financial therapy: The not-so-surprising relationship of money to relationships. *Family Therapy, 8*(5), 25-29. [Invited Journal Article]

*Peer-Reviewed Book Chapters*

**Goetz, J.** & Grable, J. (2015). Debt Management. In C. Chaffin (Ed.), Financial Planning Competency Handbook II. John Wiley & Sons.

Grable, J., **Goetz, J.,** & Valentino, K. (2015). Business Success Planning. In C. Chaffin (Ed.), Financial Planning Competency Handbook II. John Wiley & Sons.

Chatterjee, S., & **Goetz, J.** (2015). Applications of behavioral finance in financial planning. In C. Chaffin (Ed.), Financial Planning Competency Handbook II. John Wiley & Sons.

Seay, M., **Goetz, J.,** Gale, J. (2014). Collaborative Relational Model: An Interdisciplinary Financial Therapy Approach. In B. T. Klontz, S. L. Britt, & K. Archuleta (Eds.), *Financial Therapy: Research, Practice, and Policy.* Springer.

**Goetz, J.,** & Gale, J. (2014). Financial therapy: De-biasing and client behaviors. In H. K. Baker & V. Ricciardi (Eds.), *Investment Behavior: The Psychology of Financial Planning and Investing* (pp. 227-244). Wiley.

**Goetz, J.**, & Palmer, L. (2012). Content and Delivery in Financial Education Programs. In D. C. Durband & S. Britt (Eds.), *Student Financial Literacy: Campus-Based Program Development* (pp. 65-78). Springer.

Britt, S., & **Goetz, J.** (2012). Financial Education Program Partnerships. In D. C. Durband & S. Britt (Eds.), *Student Financial Literacy: Campus-Based Program Development.* Springer.

**Goetz, J.**, & Palmer, L. (2010). Increasing students' awareness of varying socioeconomic classes and the influence of the U.S. income tax system. In M. A. Cooksey & K. T. Olivares (Eds.), *Quick Hits for Service-learning: Successful Strategies by Award-winning Teachers* (pp. 121-123). Bloomington, IN: Indiana University Press.

*Technical Reports*

Mancini, D. & **Goetz, J.** (2012). *Understanding the effect of emotion on financial behaviors and tips when providing financial education to survivors.* Survivor Outreach Services, United States Army.

Palmer, L., **Goetz, J.**, & Koonce, J. (2007). *A service learning income tax assistance partnership in Athens.* Office of the Vice President for Public Service and Outreach, University of Georgia.

*Peer-Reviewed Journal Abstract*

Chatterjee, S., **Goetz, J.**, & Palmer, L. (2009). Sustainable withdrawal rates of retirees: Is the current economic shock a cause for concern? *Economics Bulletin, 29*(1), A10.

*National Conference Proceedings*

**Goetz, J.,** Chatterjee S, Cude B. (2015). *Financial advisor characteristics and quality of investment advice.* Proceedings of the Association for Financial Counseling and Planning Education.

Palmer, L., **Goetz, J.** (2015). *Client motivation and behavioral change: Applications of Appreciative Inquiry, Solution-Focused Brief Coaching, and Positive Psychology: 2015 Annual Research & Training Symposium*. Proceedings of the Association for Financial Counseling and Planning Education.

**Goetz, J.,** Chatterjee, S., & Cude, B. (2014). *Financial advisor characteristics and quality of investment advice*. Annual Conference of the Academy of Financial Services. Nashville, TN.

Gale, J., **Goetz, J.**, & Ross, B. (2013). *Ethical Considerations in Financial Therapy.* Annual Conference of the Financial Therapy Association. Lubbock, Texas.

Gale, J., **Goetz, J.,** Britt, S. (2011). Preliminary Considerations for the Development of the Financial Therapy Association. In S. J. Britt (Ed.), *Proceedings of the 2nd Annual Conference of the Financial Therapy Association*. Athens, GA.

**Goetz, J.,** Gale, J., Seay, M., & Wyczalkowski, C. (2011). The Development of a Practicum Course in Financial Therapy. In S. J. Britt (Ed.), *Proceedings of the 2nd Annual Conference of the Financial Therapy Association*. Athens, GA.

Johnson, L., **Goetz, J.,** Gale, J. Lee, M., Grossman, B. Scherr, A., & Ford, M. (2011). The ASPIRE Clinic: An Integrative Model for Providing Financial Therapy. In S. J. Britt (Ed.), *Proceedings of the 2nd Annual Conference of the Financial Therapy Association*. Athens, GA.

**Goetz, J.**, Gale, J., Bermúdez, M., Palmer, L., & Johnson, L. N. (2010). Relational financial therapy: An interdisciplinary approach [Abstract]. In S. J. Eitel (Ed.), *Proceedings of the Association for Financial Counseling and Planning Education* (p. 52). Denver, CO.

Palmer, L., **Goetz, J.**, Chatterjee, S., & Johnson, L. N. (2010). Health care reform: Opportunities for service-learning in the discipline of financial planning. In R. D. Martin (Ed.), *Proceedings of the 24th Annual Meeting of the Academy of Financial Services*, (CD, 14 pp.). Denver, CO.

Palmer, L., Koonce, J., Robison, W., & **Goetz, J.** (2010). Financial education and volunteer income tax assistance. In S. J. Eitel (Ed.), *Proceedings of the Association for Financial Counseling and Planning Education* (pp. 104-108). Denver, CO.

Palmer, L., Harness, N., & **Goetz, J.** (2009). Raising awareness of the Retirement Savers Tax Credit through student educators. In S. J. Eitel and G. Jennings (Ed.), *Proceedings of the Association for*

*Financial Counseling and Planning Education* (pp. 130-135). Scottsdale, AZ.

Chatterjee, S., Palmer, L., & **Goetz, J.** (2008). Dining together and household wealth creation: Does self regulation matter? *Proceedings of 22nd Annual Meeting of the Academy of Financial Services* [CD, 15 pp.]. Boston, MA.

Green-Pimentel, L., **Goetz, J.**, Gale, J., & Bermúdez, J. M. (2008). Providing collaborative financial and couples counseling: Experiences of the financial counselors and couples therapists [Abstract]. In I. Leech & P. Fisher, (Eds.), *Proceedings for the Association for Financial Counseling and Planning Education* (p. 11). Garden Grove, CA.

Kim, J., Green, L., Gale, J., **Goetz, J.**, Bermúdez, J. M., & Neustifter, R. (2008). Double trouble: A model for relational & financial distress [Abstract]. *Proceedings of American Association of Family Therapy* (p. 16). Memphis, TN.

Palmer, L., **Goetz, J.**, & Chatterjee, S. (2008). Service-learning for financial planning students: For now and for years to come. *Proceedings of the 22nd Annual Meeting of the Academy of Financial Services* [CD, 20 pp.]. Boston, MA.

Cude, B. J., Lawrence, F., & **Goetz, J.** (2007). Get financially fit: A financial education toolkit for college Campuses [Abstract]. In I. Leech (Ed.), *Proceedings of the Association for Financial Planning and Counseling Education*, (p. 44). Tampa, FL.

**Goetz, J.** (2007). A five-nation examination of financial risk tolerance [Abstract]. In D. Nitsch (Ed.), *Consumer Interests Annual, 53*. Available online at http://www.consumerinterests.org/i4a/pages/Index.cfm?pageid=4256**.**

**Goetz, J.**, Mimura, Y., Mehta, M., & Cude, B. (2007). HOPE or No-HOPE: Merit based college scholarship status and financial behaviors among college students [Abstract]. In D. Nitsch (Ed.), *Consumer Interests Annual, 53,* (pp. 171-173). Available online at http://www.consumerinterests.org/i4a/pages/Index.cfm?pageid=4256**.**

Palmer, L., **Goetz, J.**, Moorman, D., & Davis, B. (2007). Tracking spending and changes in college students' expenditures. *Proceedings of the 21st Annual Meeting of the Academy of Financial Services* [CD, 14 pp.]. Orlando, FL: Academy of Financial Services.

**Goetz, J.** (2006). Financial risk tolerance: A by-country comparison*. Proceedings of the 20th Annual Meeting of the Academy of Financial Services* [CD, 42 pp.]. Salt Lake City, UT.

## NATIONAL PRESENTATIONS *(not published in proceedings)*

**Goetz, J.,** Chatterjee, S., & Cude, B. (2014). *Fiduciary Standard and Advisor Characteristics*. National meeting of the Academy of Financial Services. Nashville, TN.

**Goetz, J.** (2014). *Ten Considerations Discussion* [Roundtable Facilitator]. National meeting of the Academy of the Financial Therapy Association. Nashville, TN.

**Goetz, J.** (2013). *Opening Remarks: The Future of Financial Therapy*. Annual Conference of the Financial Therapy Association. Lubbock, Texas.

Gale, J., **Goetz, J.,** & Ross, B. (2013). Ethical Considerations in Financial Therapy. Annual Conference of the Financial Therapy Association. Lubbock, Texas.

Ford, M., **Goetz, J**., & McCoy, M. (2012). *Financial Trauma: Utilizing EMDR Therapy for Healing.* Annual Conference of the Financial Therapy Association. Columbia, Missouri.

Gale, J., **Goetz, J.,** & Ross, B. (2012). *Halves and Have Knots: Ethical Issues and Decision Making in Financial Therapy.* Annual Conference of the Financial Therapy Association. Columbia, Missouri.

**Goetz, J.** (2012). *Innovation in Financial Planning Pedagogy: Integrating Experiential Learning into the Financial Planning Curriculum.* Financial Planning Standards Council of Canada. Toronto.

**Goetz, J.,** Gale, J., Seay, M., & Wyczalkowski, C. (2011, August). *The Development of a Campus-Based Clinical Practicum in Financial Planning.* Presentation at the national CFP Board Program Directors Conference. Washington, D.C.

Koonce, J., **Goetz, J.**, & Palmer, L. (2010, November). *Integrating brief one-on-one financial education into the tax preparation process*. Paper presented at the annual meeting of the Association of Financial Counseling and Planning Education. Denver, CO.

**Goetz, J.**, Gale, J., Johnson, L., & Bermúdez, M. (2010, September). *The relational financial therapy model*. Paper presented at the first annual conference of the Financial Therapy Association. Manhattan, KS.

**Goetz, J.** (2010, August). *Methods of teaching: The new financial plan development course*. Roundtable facilitated at the annual CFP Board Registered Program Conference. Washington, D.C.

Palmer, L., **Goetz, J.**, & Chatterjee, S. (2008, October). *Service-learning for financial planning students: Providing personal income tax filing assistance.* Paper presented at the annual meeting of the Academy of Financial Services. Denver, CO.

**Goetz, J.**, Hampton, V., & Zhu, D. (2007, September). *Bridging the gap – from student to practitioner: How do schools and employers help bridge the gap between the information taught in school and the needs of the workplace?* Joint FPA & CFP Board Registered Program Conference. Washington, D.C.

## GRANTS

*Grants Related to Teaching*

Ford, M., & **Goetz, J.** *Funding for development of financial literacy lab*. SunTrust Bank. 2013. $35,000.

**Goetz, J.** *Morningstar Principia investment software*. Morningstar Inc. Fall 2010 - Fall 2012. $76,000 in-kind.

Palmer, L., & **Goetz, J.** *Expanding VITA partnerships and service-learning throughout Georgia*. Georgia United Credit Union. Fall 2009-Fall 2012. $163,278 ($37,371 cash / $125,907 in-kind).

Palmer, L., **Goetz, J.**, Koonce, J., Gibson, S., Chatterjee, S., Rupured, M., & Hudson, C. *Immediate, intermediate, and long-term strategies for bringing financial planning to underserved populations*. United States Department of Agriculture Higher Education Challenge Grant. Fall 2009 - Fall 2012. $280,673. (Also listed in IV. 2. C.)

**Goetz, J.** *Service-learning fellowship grant*. Office of Service-Learning, University of Georgia. Spring 2009 - Spring 2010. $2,500.

Palmer, L., & **Goetz, J.** *Volunteer Income Tax Assistance program*. UGA Alumni Association Campus Support Fund. September 2007 - June 2008. $750.

Palmer, L., Koonce, J., & **Goetz, J.** *A service-learning income tax assistance partnership in Athens*. Scholarship of Engagement Grants to Enhance University Engagement (SEGEUE). Spring 2007. $4,500.

<u>*Grants Related to Research*</u>

Futris, T., Demeester, K., Mancini, J., **Goetz, J.,** Palmer, L., Elkins, J. Gale, J. (2015-2020). *The Integration of Healthy Marriage and Relationship Education into Family and Children Services: A Campus-Community Partnership.* Administration for Children and Families. Office of Family Assistance (HHS-2015-ACF-OFA-FM_0985). Awarded: $8,219,213. Funded to date (2015-2016). $1,659,362.

Mancini, J., **Goetz, J.,** Palmer, L., Futris, T., Mancini, D., O'Neal, C., & Grimsely, N. (2014). *Family Support Programs Evaluation Plan Development & Implementation.* National Institute of Food and Agriculture. $1,350,000. 09/01/2014-08/31/2015. Not Funded.

**Goetz, J.,** Chatterjee, S., & Cude, B. *An Examination of Differences in the Investment Advisory Process.* The AARP. Fall 2011-Spring 2012. $55,000.

Palmer, L., **Goetz, J.**, Koonce, J., Gibson, S., Chatterjee, S., Rupured, M., & Hudson, C. *Immediate, intermediate, and long-term strategies for bringing financial planning to underserved populations.* USDA Challenge Grant. January 2009 – January 2012. $280,673.

Palmer, L., **Goetz, J.**, Chatterjee, S., & Koonce, J. *Making saving easier: Reducing cognitive barriers to wealth accumulation as a tool to decrease poverty in Georgia*. Poverty and the Economy Faculty Research Grants Program, Office of the Vice President for Public Service and Outreach, University of Georgia. January 2011 - December 2011. $16,000.

Palmer, L., Harness, N., **Goetz, J.**, & Everson, D. *Employee benefits education in the community through VITA*. Scholarship of Engagement Grants to Enhance University Engagement (SEGEUE), University of Georgia. Fall 2008 - Spring 2009. $4,737.

Gale, J., **Goetz, J.**, Bermúdez, M., & Burwell, S. *Creating a conjoint financial counseling and couple counseling treatment model for couples on the threshold of poverty*. Poverty and the Economy Faculty Research Grants Program, Office of the Vice President for Public Service and Outreach, University of Georgia. January 2007 - May 2008, $23,050.

Palmer, L., & **Goetz, J.** *Effects of Volunteer Income Tax Assistance (VITA) on students*. Georgia Federal Credit Union. October 2007 - May 2008. $2,973.

## TEACHING

### <u>Evidence of Teaching Effectiveness</u>

***Student Course Evaluations: Mean 4.7 on a 5 point scale*** *(across all courses over nine years)*

*Evaluation scores based on required eight-item scale with a range of 1 to 5 (5=highest and best score).*

***Courses Taught:***

- Introduction to Personal Finance (undergraduate level)

- Survey of Financial Planning (i.e., Financial Planning Fundamentals) (undergraduate level)
- Financial Counseling and Client Communication (undergraduate and graduate level)
- Financial Therapy Seminar (graduate level)
- Clinical Practicum in Financial Therapy (undergraduate and graduate level)
- Clinical Practicum in Financial Planning (undergraduate and graduate level)
- Practice Management in Financial Planning (undergraduate and graduate level)
- Capstone in Financial Planning (i.e., Financial Plan Development) (undergraduate and graduate level)

***New Undergraduate Courses***

- FHCE 4900 Clinical Practicum in Financial Planning
  (Developed clinical practicum course wherein students provided financial counseling to clients under faculty and graduate student supervision.)

***New Graduate Courses***

- HACE 6900 Clinical Practicum in Financial Therapy
  (Graduate students provided financial planning and counseling to clients under instructor supervision; students collaborated with doctoral students from marriage and family therapy to better serve clients.)
- HACE 8900 Seminar in Financial Therapy
  (Course designed to introduce new discipline of financial therapy with a focus on counseling skills.)
- FHCE 7205S Clinical Practicum in Financial Planning
  (Developed and integrated self-observation and reflection exercises into course; developing collaborative counseling opportunities with Law and MFT students.)

***Substantially Revised Courses***

- HACE 3250 Survey of Financial Planning
  (Course integrated use of new textbook, classroom response system, and case study analysis.)
- HACE 5200 Financial Counseling
  (Course integrated service-learning components, including financial education and wealth coaching.)
- HACE 5250/7250 Financial Planning Capstone Course
  (Real clients were brought into classroom for students to develop and present a financial plan.)

***Program Development, Financial Planning***

- Contributed to development of the non-thesis accelerated master's program – Financial Planning emphasis, 2011-2012
- Contributed to development of new admissions criteria for FHCE graduate programs, 2012
- Completed four renewal processes for the UGA CFP Board-Registered program, 2010-2012
- Co-coordinated the implementation of the undergraduate Financial Planning major and non-thesis option for the master's program - Financial Planning emphasis, 2006-2011
- Co-developed a CFP® certificate program in financial planning for professionals in collaboration with an industry partner – Cannon Financial Institute, 2008-2010

***Participation in Teaching Symposiums***

- 2010 OneAthens@UGA Symposium. The Georgia Center, University of Georgia, Athens, GA
- 2009 UGA Academic Affairs Faculty Symposium. Unicoi Lodge, Unicoi State Park, GA
- 2008 UGA Academic Affairs Faculty Symposium. Unicoi Lodge, Unicoi State Park, GA

***Guest Lectures***

- Regular guest lecturer for HACE 3110: Money Skills for Life; Lecture: *Investing: How To Get Started*
- Regular guest lecturer for HACE 3000: Family Resource Management; Lecture: *Financial Management Fundamentals*
- Regular guest lecturer for HACE 8100: Theory of Households, Consumer Economics, and Financial Behavior I; Lecture: *Prospect Theory & Research Applications*
- Regular guest lecturer for HACE 4205 & 6205: Portfolio Management; Lecture: *Risk Tolerance*

## OUTREACH AND PUBLIC SERVICE

***Outreach and Service-Related Publications & Grants***

** See above - previously listed under peer-reviewed articles/book chapters and Grants*

***Select Seminars and Workshops (All invited)***

**Goetz, J.** (2015-present). *Financial Planning for Pharmacy Students.* College of Pharmacy, University of Georgia.

**Goetz. J.** (2012-present). *Financial Management for First-Year Students of Veterinary Medicine*. College of Veterinary Medicine, University of Georgia.

**Goetz. J**. (2012-present). *Financial Planning for Veterinary Medicine Residents: Transitioning into the Professional World.* College of Veterinary Medicine, University of Georgia.

**Goetz, J.** (2013). *Panel Member for Service-Learning Fellows: Faculty Perspectives*. UGA Office for Servicel-Learning.

**Goetz, J.** (2013). *Estate Planning for Emergencies.* Presbyterian Church of Athens.

**Goetz. J.**, & Ford, M. (2012). *ASPIRE: Services for the Athens Community.* Athens Kiwanis Club.

**Goetz, J.** (2012). *Financial Planning Basics.* Athens Community Council on Aging.

**Goetz, J.** (2012). *Estate Planning and End-of-Life Financial Considerations.* Abbey Hospice Foundation. Social Circle, Georgia.

**Goetz. J**. (2012). *Financial Management for First-Year Students of Veterinary Medicine*. College of Veterinary Medicine, University of Georgia.

**Goetz, J.** (2011). *Financial Wellness for Graduate Students Studying Veterinary Medicine*. College of Veterinary Medicine, University of Georgia.

**Goetz, J.** (2011). *Financial Strategies for University Faculty*. College of Veterinary Medicine, University of Georgia.

**Goetz, J.** (2011). *Financial Wellness for Graduate Students Studying Veterinary Medicine*. College of Veterinary Medicine, University of Georgia.

**Goetz, J.** (2010). *Increasing Your Financial Stability*. Athens Area Homeless Shelter. Athens, Georgia.

**Goetz, J.** (2010). *Financial Wellness for Graduate Students Studying Veterinary Medicine*. College of Veterinary Medicine, University of Georgia.

**Goetz, J.** (2009). *Financial Educational Program: How to manage your money like a pro.* [Panelist] Kappa Alpha Psi & NAACP, University of Georgia.

Gale, J., **Goetz, J.**, Kim, J. H, & Bermúdez, J. M. (2009). *Relational Financial Therapy: A model for collaboration for family therapists and financial planners*. Workshop conducted for the North East Georgia Chapter of the Georgia Association for Marriage and Family Therapy, Athens, GA.

**Goetz, J.** (2008). *Financial Planning for Retirement.* Training & Development, Human Resources Office, University of Georgia.

Palmer, L., & **Goetz, J.** (2008). *Retirement Readiness*. Back to FACS Summer School Program, College of Family and Consumer Sciences, University of Georgia.

**Goetz, J.** (2008). *Financial Planning for Retirees.* Training & Development, Human Resources Office, University of Georgia.

**Goetz, J.** (2008). *Financial Planning for Everyone*. Training & Development, Human Resources Office, University of Georgia.

**Goetz, J.** (2007). *The Psychology of Money*. Honors College Lunchbox Lectures Series, University of Georgia.

**Goetz, J.** (2007). *Becoming Wealthy on a Teacher's Salary*. Back to FACS Summer School Program, College of Family and Consumer Sciences, University of Georgia.

***ASPIRE Clinic (Interdisciplinary Collaboration)***

In 2010, co-founded the ASPIRE Clinic, a unit of the College of Family and Consumer Sciences at the University of Georgia. The mission of the Clinic is to use interdisciplinary research, teaching, and service to help individuals, couples, and families address issues of interpersonal relations, money management, nutrition, health, and home environment toward the goal of leading fulfilling and healthy lives. The ASPIRE Clinic involves a faculty representative from each the following university programs:

- Financial Planning
- Marriage and Family Therapy
- Nutrition
- Furnishings & Interiors (Home Design)
- Law School Public Interest Practicum

Clinical Faculty Supervisor for financial planning students seeing clients in the ASPIRE Clinic. Provided supervision for a total of 16 (10 graduate, 6 undergraduate) students since 2008. Developed community partnerships with Project Safe, Athens Area Homeless Shelter, The Stable Foundation, and The Ark, whose clientele we are now served in the ASPIRE Clinic.

***Multi-Institutional Teaching & Service Collaboration***

Palmer, L., Goetz, J., Koonce, J., Gibson, S., Chatterjee, S., Rupured, M., & Hudson, C. *Immediate, intermediate, and long-term strategies for bringing financial planning to underserved populations* (2009 – 2012). USDA. $280,673.

This collaborative statewide project seeks to expand and improve financial planning and education to underserved populations in rural areas of Georgia and to provide guidance in establishing a financial planning program at Clark Atlanta University (a Historically Black College and University). Service-learning at each of the institutions is a cornerstone of the project.

*Partnering institutions and organizations:*

- Georgia United Credit Union
- Clark Atlanta University
- Dalton State College
- The University of Georgia Cooperative Extension
- The FACS ASPIRE Clinic

## STUDENT ADVISING & MENTORING

*Undergraduate Student Advising*

- Mentor numerous early career alumni, 2007-present
- Faculty Advisor, UGA of FPA: Student Financial Planning Association (SFPA), 2009-2011
- Honor's Faculty Mentor for 9 students including one Foundation Fellow, 2007-2011
- Accompanied students to 6 regional and 7 national professional meetings, 2006-2013
- Academic Advisor for approximately 15-20 undergraduate students per semester, 2007-2010
- Provided opportunities for over 50 students to sit for AFC and CRC professional exams before graduation, 2006-2010

*Graduate Student Committees*

- Served on over 25 graduate committees; chaired seven graduate student committees

## OTHER SCHOLARLY ACTIVITIES

**Reviewer for Scholarly Publications**

***Editorial Board Member***

- *Journal of Financial Planning,* 2013-Present
- *Journal of Financial Counseling and Planning*, 2011-present
- *Journal of Personal Finance,* 2011-present
- *Journal of Financial Therapy*, 2010-present

***Ad Hoc Reviewer***

- *Asia Pacific Management Review,* 2010-2011

- *Journal of Financial Counseling and Planning*, 2007-2010
- *Journal of Personal Finance*, 2008-2010
- *Journal of Consumer Affairs* , 2007
- *Journal of Family and Economic Issues,* 2006

***Conference Reviewer***

- Financial Therapy Association (FTA), 2010-present
- Association of Financial Counseling and Planning Education (AFCPE), 2006-2013
- Academy for Financial Services (AFS), 2005-2009
- American Council on Consumer Interests (ACCI), 2007-2009
- ACCI - Financial Planning Paper Award Committee, 2008

*National Meeting Participant*

- Attended by invitation, *U.S. Treasury Department Symposium on Relationship Finance* (2008), Washington, D.C.
- Attended by invitation, *NEFE Symposium: Financial Realities of Young Adults* (2008), Denver, CO.
- Attended by invitation, *Financial Therapy Forum*, Institute of Personal Financial Planning (2008), Riverside, CA.

## CONTRIBUTIONS IN SERVICE TO SOCIETY, UNIVERSITY, AND PROFESSION

### Department of Financial Planning, Housing and Consumer Economics

- Member, Endowed Professorship in Family Financial Planning Search Committee, Department of Housing and Consumer Economics, 2011
- Co-coordinated Financial Planning Annual Spring Banquet for students and Atlanta area professionals, 2008-present
- Consulted with prospective students interested in studying financial planning, 2006-present
- Chair, Assistant Professor in Financial Planning Search Committee, Department of Housing and Consumer Economics, 2008-2009
- Member, Graduate Curriculum Review Committee, Department of Housing and Consumer Economics, 2007-2009
- Co-developed marketing materials for the Financial Planning Program, 2006-2009
- Member, Graduate Admissions and Policy Committee, Department of Housing and Consumer Economics, 2007-2008
- Chair, Assistant Professor in Financial Planning Search Committee, Department of Housing and Consumer Economics, 2006-2007
- Member, Assistant Professor in Financial Planning Search Committee, Department of Housing and Consumer Economics - Griffin Campus, 2006-2007

**College and University**

- Member, PRAC Review Team, College of Forestry, 2014-2015
- Member, University Council, University of Georgia, 2009-2012
- Member, Human Resources Committee, University Council, 2009-2010
- Member, Dean's Faculty Advisory Committee, College of Family and Consumer Sciences, 2008-2010
- Member, Computer Advisory Committee, College of Family and Consumer Sciences, 2008-2009
- Member, Faculty Learning Community, Service Learning: Supporting Student Engagement and Faculty Research, University of Georgia, 2008
- Member, Dean's Search Committee, College of Family and Consumer Sciences, 2006-2007

**Professional Memberships and Service**

***Financial Therapy Association***

- 2014 Past President and Board Member
- Co-Chair (by appointment), Financial Therapy Association 2011 Conference Committee
- Founding Board Member (by election), Financial Therapy Association (FTA), 2010-2014

***Professional Advisory Boards***

- Member (by invitation), Financial Planning Association of Georgia Board, 2011-2012
- Member (by invitation), Georgia United Credit Union UGA Advisory Board, 2008-2011

***Professional Association Memberships***

- American Council on Consumer Interests (ACCI), 2006-2013
  - Emerging Scholars Pre-Conference Planning Committee, ACCI, 2010
- National Association of Personal Financial Planners (NAPFA), 2010-present
- Society for Financial Service Professionals (SFSP), 2008-2012
- Academy of Financial Services (AFS), 2006-present
- Association for Financial Counseling and Planning (AFCPE), 2006-present
- Financial Planning Association (FPA), 2006-present

**A. Select Media Consultations & Quotations**

- Geffner, M. (2014). Reverse mortgage and your adult children. Bankrate.com http://www.bankrate.com/finance/mortgages/reverse-mortgage-adult-children.aspx
- US News & World Report; Wall Street Journal (2013)
- Steinberg, J. (2012, December 21). When Brokers Double as Therapists. *The Wall Street Journal*. Available at: online.wsj.com

- Frellick, M. (2011, February 4). Three options for dealing with the February financial freak-out. Fox Business. Available at: http://www.foxbusiness.com/personal-finance/2011/02/04/options-dealing-february-financial-freak/
- Hollingsworth, H. (2009, December 6). Financial therapy blends mental health, money help. The Associated Press.
- Provided an interview for the Associated Press on the topic of financial therapy, which led to an article published in 100+ news media.
- Quoted multiple times in local newspapers, including the UGA Red and Black, Athens Banner Herald, and Atlanta Journal Constitution, 2006-2011
- Participated in two shows on Georgia Public Radio as Financial Expert, 2009-2010