

## **Resident Full-Time PFP PhD Student Travel Policy 2017 – 2018** *(Bolded, italicized text has been added to the policy for 2017-2018)*

### **Departmental Funding**

Funding will be allocated according to Texas Tech University and State travel regulations (OP 79.01). Total allocation cannot exceed what is allowed by law. Departmental funding will be provided only to resident (on-campus), full-time, PhD students.

- Funding is limited to two trips per academic year to approved conferences that meet the department's mission. This is not a vacation—you will be expected to attend sessions and report back in classes such as PFP 6301 and 6305. ***The following conferences are pre-approved:***

#### **Professional Conferences**

- ***Financial Planning Association (FPA)***
- ***National Association of Personal Financial Advisors (NAPFA)***
- ***Society of Financial Service Professionals (FSP)***

#### **Academic Conferences**

- ***Academy of Financial Services (AFS)***
- ***Financial Therapy Association (FTA)***
- ***Financial Management Association (FMA)***
- ***Association for Financial Counseling and Planning Education (AFCPE)***
- ***American Council on Consumer Interests (ACCI)***
- ***Southern Economic Association***
- ***CFP Registered Program Conference***
- ***CFP Research Symposium***

***Funding for conferences/travel not on this pre-approved list may be available; however, a short written justification addressing the relevance of the conference/travel to your PhD studies and the PFP Department must be submitted along with your travel application at least 5 days prior to the typical travel application deadline. The justification should include the focus of the conference/travel (including the schedule/agenda), where the conference is located, and the amount of funding you are requesting for this conference/travel. If a specific faculty has recommended you attend this conference, please include the faculty's name in the justification.***

- The department will provide up to \$650 for one trip and up to \$1,000 for two trips. After a student has completed Research I, the student will need to present a paper/poster session to receive the additional \$350 towards a 2<sup>nd</sup> conference. We strongly encourage students to use some of this funding as a “department match” to get additional funding from the Graduate School when travel meets their requirements.\*
- ***If presenting research before one has completed Research I with a B or better, you must have a faculty co-author (or have a faculty review and sign off on the abstract/paper/poster before it is submitted).***

Only expenditures up to the allocated amount are eligible for reimbursement. Once your departmental travel funds are depleted, no further travel funds will be considered or awarded on behalf of PFP.

When booking your travel, book directly with the airline or hotel. Agencies such as Expedia, Orbitz, or Travelocity do not provide sufficient documentation for reimbursement by the State of Texas. With the exception of conference hotels, please do not exceed State contract rates or Federal per diem rates. Due to the restrictions on available funding sources, the Department does not guarantee full reimbursement when State contract rates are exceeded. Rates information can be found by visiting the following website:

<https://www.fiscal.ttuhs.edu/travel2/Help/links.aspx>.

## Departmental Application Process

### Prior to Departure

The "[\*Application for Official Travel and Estimated Travel Expenses\*](#)" form must be submitted to PFP's graduate student travel preparer, **Cynthia Cantu**, at **least ten (10) business days prior to departure (35 days if requesting a grad school match and 40 days if the travel is international)**. In accordance with TTU policy, reimbursement for travel will **NOT** be provided if forms are not submitted prior to travel. The Graduate School and TTU travel enforce very strict deadlines...these deadlines are to help you receive the travel funding you want. The following document is required to ensure reimbursement:

([http://www.depts.ttu.edu/pfp/phd/forms/Travel\\_App\\_Form.pdf](http://www.depts.ttu.edu/pfp/phd/forms/Travel_App_Form.pdf))

- **Completed "[\*Application for Official Travel and Estimated Travel Expenses\*](#)"** – include details such as the full name of the conference and the specific purpose for attending - if presenting; provide the title of the paper/poster/panel you will be presenting.

### Upon Return

All **original receipts** must be turned in to your travel preparer, within **five (5) business days** upon your return. Travel reimbursements become taxable income if university timelines are exceeded.

- **Airline Reservation and Itinerary** – proof of payment must be shown on receipt
- **Hotel Portfolio** – documentation must be on official hotel letterhead and show the total amount for your stay along with proof of payment resulting in a zero balance remaining at check-out. If sharing a room, please have the hotel split the bill and issue separate receipts in each guest's name.
- **Conference Registration and Schedule** – provide only if registration fee was paid out of pocket and is to be reimbursed as part of travel expenses. Schedule provided should show meals, if any, provided at the conference.
- **Meal Receipts** – reimbursements will not be provided for meal times were the conference provided food. Individual meal receipts are not required. Total amount provided as meal reimbursement will not exceed the location's per diem limit.
- **Other Receipts** – provide receipts for all expenses incurred such as parking, taxi or public transportation, excess baggage fees, etc.

### \*Additional Funding Sources

The Graduate School has additional funds available for presentations at professional conferences. In order to obtain Grad School funds, applications must be submitted according to the Graduate School's guidelines at <http://www.depts.ttu.edu/gradschool/students/current/index.php>. When applying for funding from the Grad School, all documentation must be routed through your PFP travel preparer. All application materials needed by the Grad School must be received by PFP (**Cynthia Cantu**) at least **35 business days prior to departure**.