Chia-Li Chien, Ph.D., CFP®, PMP®, CPBC

Associate Professor of Practice
Center for Financial Responsibility Director
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PROFESSOR OF PRACTICE

BRIDGE THEORY AND PRACTICE TO ADVANCE FINANCIAL PLANNING PROFESSION

Deliver experiential learning that strengthens institutional outcomes, advances student readiness, and supports growth of future advisors equipped for dynamic financial planning demands. Connect with industry leaders, advisory firms, and community partners to align curriculum relevance with evolving professional standards. Provide leadership development, advisor coaching, and structured mentoring that support learner confidence, ethical decision-making, and long-term career success. Apply expertise in owner succession and exit planning to enrich classroom learning with practical, real-world insight.

CORE COMPETENCIES

Succession Planning | Financial Planning | High Net Worth Planning | Curriculum Development
Leadership Development | Coaching and Mentoring | Relationship Management | Implementation Mastery

ACADEMIC & PROFESSIONAL EXPERIENCE

Texas Tech University College of Health and Human Sciences, Lubbock, TX — 2026 - present

Associate Professor of Practice & **Center** for Financial Responsibility **Director**, School of Financial Planning

- Provide strategic leadership for financial planning & wellness outreach, community engagement, research initiatives, student experiential learning, and industry partnerships within the Texas Tech University.
- Teach, mentor, and support the development of future financial planning professionals.

Value Growth Institute, Charlotte, NC. — 2009 - present

Succession Program Director

Advise & execute succession planning for $50M to $250M middle market private businesses. Coach owners through succession readiness and internal ownership transition.

- Implemented & transformed 11-state licensor to a 48-state franchisor entity (or 4.3x market growth). Achieved 100% revenue growth in one-year after launching franchisor business model.
- Coached owners to leverage gifting strategies for internal transfer ownership in five to seven years without gift and estate tax liabilities.
- Coached ESOP entity leadership cohorts to grow & maintain 3-5%+ EBITDA annually with 50%+ leadership retention & promotion ratios.

CFP BOARD OF STANDARDS, Washington, DC. — 2025 - 2026

Managing Director, Professional Practice

Led a 56% profit margin in a not-for-profit professional credentialing team.

- Achieved highest annual number of certification exam takers since inception.
- Developed and hosted the highest ever registered and attended webinar on OBBBA Key Elements by assembling and leading external subject-matter-experts CFP®.
- Turned around and secured five-year cycle third-party voluntary credentialing accreditation.
- Streamlined and standardized the cross-functional credentialing accreditation framework to ensure sustained alignment with accreditation standards quarterly basis.

The American College of Financial Services, King of Prussia, PA — 2022 - 2025

Associate Professor and Associate Provost of Undergraduate & Graduate Programs

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Led an average 50% profit margin in a not-for-profit accredited higher education institution with 13 degree & non-degree programs.

- Surveyed, designed, and secured approval for an advanced financial planning curriculum focused on ultra and high-net-worth planning in 6 months, 50% faster than peer institutions. This effort diversified revenue and positioned the institution for specialized, future-oriented growth aligned with industry demand.
- Established and secured approval for a newly created graduate CFP® financial planning program.
- Turned around and received an eight-year Middle States Commission on Higher Education accreditation.

CALIFORNIA LUTHERAN UNIVERSITY, Thousand Oaks, CA 2018 – 2022

Assistant Professor & **Director of Financial Planning Program** (Tenure track, an ACBSP University)

- Established and secured approval for a newly created undergraduate CFP® financial planning program in business school.

BALL STATE UNIVERSITY, Muncie, IN 2015 – 2018

Instructor & **CFP® Program Director** (An AACSB university)

- Established and secured approval for a newly created undergraduate CFP® financial planning program in business school, growing enrollment from 6 to 96 students in 1 year.

ADDITIONAL PROFESSIONAL EXPERIENCE

Lincoln Financial Group, Charlotte, NC | Exit Planning Advisor	2005 – 2009
Diageo North America, Stamford, CT | Director of Systems – Corp. Finance	1999 – 2004
Royal & Sun Alliance, Farmington, CT | Project Manager	1997 – 1998
ABB, Windsor, CT | Financial Systems Engineer	1991 – 1997
CIGNA, Waterbury, CT | Financial Systems Analyst	1990 – 1991

EDUCATION

- Doctorate in Financial and Retirement Planning (Ph.D.), The American College of Financial Services, 2018, King of Prussia, PA
- Master of Science, Financial Services (MSFS), The American College of Financial Services, 2014, King of Prussia, PA
- Master of Science (MS), Insurance, minor in MIS, University of Hartford, 1991, W. Hartford, CT
- B.S., Finance, minor in Accounting, Central Connecticut State University, 1989, New Britain, CT

CERTIFICATIONS & MEMBERSHIPS

- CFP® (Certified Financial Planner), Exam: Mar 2005, Certificant: Aug 2008 - present
- PMP, Project Management Professional & member of Project Management Institute (PMI) 2004-present
- CPBC (Certified Professional Business Coach) & member of Professional Business Coaches Alliance (PBCA) 2021-present
- Psychology of Financial Planning Specialist™, 2024
- Certification in teaching with AI, 2024
- Professional Memberships

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- Financial Planning Association (FPA) 2008 - present
- Academy of Financial Services (AFS) 2016 - present
- Project Management Institute (PMI) 2007 – present
- The National Association of Personal Financial Advisors (NAPFA) 2018 - present

ACADEMIC PEER-REVIEWED PUBLICATIONS[1]

3 Karthaus, J. P., **Chien, C.-L**., Bennetts, C.R., & Evania, Z. (2026, July). A Probability-Based Framework for Life Insurance Evaluation. Journal Of Financial Service Professionals. Vol. 80, No. 4, pp. 35-49. https://digitaleditions.sheridan.com/publication/?i=866764&p=37&view=issueViewer

3 Karthaus, J. P., & **Chien, C.-L**. (2026, March). Sequence of Return Risk in Variable Universal Life and the Role of Allocated Charges. Journal Of Financial Service Professionals. Vol. 80, No. 2.

5 Nourallah, M., Chan, H.R., **Chien, C-L**., Öhman, P. (2025, March 28). Financial Capability and Well-being among Financial Advisors. Financial Planning Review, 8(2), e70002. https://doi.org/10.1002/cfp2.70002

CS **Chien, C**., & Hiebert, D., (2023). Valuing a privately held firm: the discounted cash flow method. In SAGE Business Cases. SAGE Publications, Ltd., https://dx.doi.org/10.4135/9781529624786.

CS Karakachian, H.J. & **Chien, C**., (2023). A Case Study of Non-U.S. Person Buying Real Estate Property in the U.S. In SAGE Business Cases. SAGE Publications, Ltd. https://dx.doi.org/10.4135/9781529619249.

CS **Chien, C**. (2022). Accounting for Retirement Asset Distributions during the Decumulation Stage of Life. In J. Grable & S. Chatterjee (Ed.), De Gruyter Handbook of Personal Finance (pp. 383-404). Berlin, Boston: De Gruyter. https://doi.org/10.1515/9783110727692-023.

CS **Chien, C**. (2022). How should CBC credit union analyze the effectiveness of a pilot financial education course for working adults? In SAGE Business Cases. SAGE Publications, Ltd., https://www.doi.org/10.4135/9781529796445.

CS **Chien, C.,** Cosentino, S. W., & Salehi, H., (2022). Retirement income: The case of direct investment in short-term rental property compared to a dividend stock. In SAGE Business Cases. SAGE Publications, Ltd., https://www.doi.org/10.4135/9781529794274.

CS **Chien, C.,** Cosentino, S. W., & Thiel, J. F., (2021). Forecasting assessment revenue: The case of ventura county lodging association. In SAGE Business Cases. SAGE Publications, Ltd., https://www.doi.org/10.4135/9781529758184.

CS **Chien, C**. (2021). Succession planning in ensemble financial planning practice. In SAGE Business Cases. SAGE Publications, Ltd., https://www.doi.org/10.4135/9781529735956.

CS **Chien, C**. (2019). Enhancing retirement success rates in the United States: Leveraging reverse mortgages, delaying social security, and exploring continuous work. Switzerland, Cham: Springer International Publishing. https://doi.org/10.1007/978-3-030-33620-2.

3 **Chien, C**. (2017). Selling a Planning Practice: The Relationship between Revenue Multiple and Revenue Size. Journal of Financial Planning 30 (3): 52–61. https://www.financialplanningassociation.org/article/journal/MAR17-selling-planning-practice-relationship-between-revenue-multiple-and-revenue-size.

ACADEMIC PEER-REVIEWED CONFERENCE PRESENTATIONS

- Nourallah, M., Chan, H.R., Chien, C-L., Öhman, P. (2024, Sept 18). Financial Capability and Well-being among Financial Advisors. Columbus, Ohio: 2024 Academy of Financial Services.

[1] Authors are ordered according to their contribution. Student authors (including graduated student dissertation authors) are highlighted in gray. Publications are ranked by the PFP Publications Committee as 1 (Non-ISI ranked with poor characteristics in other journal ranking factors) through 5 (ISI ranked and in the top 50% of all impact factors within a discipline) according to pre-determined guidelines in March 2026. CS, a peer-reviewed SAGE business case indicated "Case Studies." in Rawls College of Business. A dash (-) indicates not yet rated.

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- Lang, J.W., Chien, C.L., Cummings, B.F., Martin, J, & Martin, T.K. (2022, Oct 24,). The Impact of Financial Literacy Interventions on College Funding and Retirement Accumulation. Washington, D.C.: 2022 Academic Research Colloquium for Financial Planning and Related Disciplines, CFP Board.
- Lang, J.W., Chien, C.L., Cummings, B.F., Martin, J, & Martin, T.K. (2022, Sept 27). The Impact of Financial Literacy Interventions on College Funding and Retirement Accumulation. Virtual Conference: 2022 Academy of Financial Services. https://mtgsked.com/p/1429/c.
- Karakachian, H.J. & Chien, C. (2022, Sept 27). A Case Study of Non-U.S. Person Buying Real Estate Property for A U.S. Person. Virtual Conference: 2022 Academy of Financial Services. https://mtgsked.com/p/1429/c.
- Chien, C. & Hiebert, D. (2022, Sept 28). Valuing a Privately Held Firm Using the Discounted Cash-Flow. Virtual Conference: 2022 Academy of Financial Services. https://mtgsked.com/p/1429/c.
- Chien, C-L. (Sept 21, 2021). The Retirement Income: The Case of Short-Term Rental Property Direct Investment Compared to a Dividend Stock. Virtual: 2021 The Academy of Financial Services 35th Annual Meeting. https://mtgsked.com/p/1306/c.
- Turner, K. & Chien, C-L. (July 29, 2020). The Impact of Mid-Late Career Health Shocks on Retirement Wealth. Virtual: The 13th Biennial Virtual Conference of Asian Consumer and Family Economics Association (ACFEA).
- Turner, K. & Chien, C-L. (Oct. 1, 2020). The Impact of Mid-Late Career Health Shocks on Retirement Wealth. Virtual: 2020 Academy of Financial Services.
- Turner, K. & Chien, C-L. (Nov. 16, 2020). The Impact of Mid-Late Career Health Shocks on Retirement Wealth. Virtual: 2020 AFCPE® Research & Training Virtual Symposium.
- Chien, C.L. (2019b). Practical Strategies to Enhance Retirement Success Rates in The United States (part 3 of 3). Minneapolis, MN: 2019 Academy of Financial Services.
- Chien, C.L. (2019c). What are the U.S. Retirement Population Success Rates When Using HECM? Arlington, VA: 2019 Academic Research Colloquium for Financial Planning and Related Disciplines, CFP Board.
- Chien, C.L. (2018). Practical Strategies to Enhance Retirement Success Rates In The United States: Base Model. Chicago, IL: 2018 Academy of Financial Services.
- Chien, C.L. (2018). What Are the U.S. Retirement Population Comprehensive Assets' Success Rates? Arlington, VA: 2018 Academic Research Colloquium for Financial Planning And Related Disciplines, CFP Board.
- Chien, C.L. (2017). Advising Privately Business Owners Industry Specific Selling Factors. Nashville, TN: 2017 Academy of Financial Services.
- Chien, C.L. (2017). Will Pro Bono as Continuing Education credits enhance CFP as a profession in extending social contracts? Nashville, TN: 2017 Academy of Financial Services.
- Chien, C.L. (2017). Can the Social Security Trust Fund Sustain Financial Stability if Individuals Opt Out? Arlington, VA: 2017 Academic Research Colloquium For Financial Planning And Related Disciplines, CFP Board.
- Chien, C.L. (2017). Selling a Planning Practice: The Relationship between Revenue Multiple and Revenue Size. Arlington, VA: 2017 Academic Research Colloquium For Financial Planning And Related Disciplines, CFP Board.
- Chien, C.L. (2016). Connecting "Filial Piety" Culture Heuristic to Successful Retirement Planning for Asian American Immigrants. Las Vegas: 2016 Academy of Financial Services. https://goo.gl/Kzujbj.

PH.D. DISSERTATION ADVISOR

- Mustafa Nasrallah, Mid Sweden University, Sundsvall, Sweden. Committee member. The research topic: A tale of two FinTech solutions: Loyalty in mobile bank applications and initial trust in financial robo-advisors.
- Jeffrey Hatchman, The American College of Financial Services. Committee member. The research topic: Evaluation of Retirement Buffer Asset Alternatives.

RESEARCH ADVISOR

- School of Management (SOM) PRiME Festival of Scholars and active Faculty Advising role: achieved 20-22% of students in finalists and winners annually.
    - In 2020-2021, there 9 MBA/MS FP from MFP 545 & 1 TUG FP minor students submitted the competition (as of April 29, 2021). Two of them became the finalists and winners:
        - Undergraduate FP minor student Melissa Wasylewski won grand prize (BS 2021).
        - Beginning to Save: Rationality, Financial Knowledge, and Saving Behavior Author: Anne Wittig (MS in Financial Planning) won 2nd prize (MS FP 2021).
    - In 2019-2020, there were 10 students from MFP545 class (Financial Behavior), two of them became the finalists:
        - Financial Literacy, Grades K-12: Kris Etter (MBA FP 2022).
        - Discovering Behavioral Issues Related to Retirement Planning: Savings vs. Consumption Behaviors of Divorcees and Financially Distressed Couples: Kendyl Roundtree (MS FP 2020).
    - In 2018-2019, there were three students from MFP534 class submitted to the competitions. One became the finalist in two research.
        - Going Out of Business: Tam Wolfe-Callanta (MBA FP 2019).
        - The Future is Now: Plan for It! Tam Wolfe-Callanta (MBA FP 2019).

PEER REVIEWER FOR PUBLISHERS

- Palgrave Macmillan. (July 2021, July).
- Academy of Financial Services.
    - (2021, July). Academy of Financial Services Annual Meeting 2021.
    - (2020, July). Academy of Financial Services Annual Meeting 2020. Peer-reviewed for two research submissions.
    - (2019, July). Academy of Financial Services Annual Meeting 2019. Peer-reviewed for two research submissions.
- Journal of Financial Counseling and Planning. Association for Financial Counseling & Planning Education.
    - (2024, Sept). Peer-reviewed for one research submission.
    - (2021, Sept). Peer-reviewed for one research submission.
    - (2020, Nov). Peer-reviewed for one research submission.
- Wiley CFP Practice Exam. (2020, July). Hoboken: Wiley. Retrieved From: https://www.efficientlearning.com/ucfp
- Journal of Personal Finance
    - Feb 26, 2024
    - Oct 28, 2022
    - Feb 23, 2017
    - Dec 15, 2016

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TEXTBOOKS

- AMA, Chien, C.L. (2022). AMA's Advanced Financial Forecasting and Modeling Workshop. New York: American Management Association.
- Chien, C.-L. (2021). Education, Risk Management and Insurance, Tax, Retirement Savings, and Income Planning, and Estate Planning. In Wiley Efficient Learning, CFP Certification Gold Course (pp. Module D34, D35, F46, D30, mock exams in module C, F, & H). Hoboken: Wiley. Retrieved From: https://www.efficientlearning.com/ucfp.
- Chien, C.-L. (2020). Education, Risk Management and Insurance, Tax, Retirement Savings and Income Planning, and Estate Planning. In Wiley Efficient Learning, CFP Certification Gold Course (pp. Module C18, C19, C20, C21, D24, D29, F42, F43, F44, F45, F46, F47, F50, F51, G55, G56, G57, G58, G60, H66). Hoboken: Wiley. Retrieved From: https://www.efficientlearning.com/ucfp.
- Chien, C.L., Frischkorn, J., Beal, T. (2019). Business Essentials Certificate Program. New York: American Management Association.
- Chien, C.L. (2017). WMCP™ Wealth Management Certified Professional. Bryn Mawr, PA. The American College of Financial Services. (Two chapters contributor).

MEDIA INTERVIEWS

- Chien, C.-L. (2024, Dec 19). Leadership Development and Succession Planning. The American College of Financial Services.
- Chien, C.-L. (2024, June 11). Summer Leadership Institute Remote Panel Discussion. Colorado Conservatory of Dance.
- Chien, C.-L. (2022, July 14). NextGen in 10. NextGen Advisory Task Force. The American College of Financial Services.
- Chien, C.-L. (2021, July 15). State Farm Center for Women - Women Influencer Podcast Series. The American College of Financial Services.
- Chien, C.-L. (2020, July 28). Close Encounters of the Board Kind - A WIFS Summer Series. Women In Insurance & Financial Services.
- Chien, C.-L. (2020, March). Leave a penny. CLUMagazine. (K. Matthews, Interviewer). Retrieved From: https://blogs.callutheran.edu/magazine/2020/03/17/leave-a-penny/.

SPEAKING ENGAGEMENTS (INVITED PRESENTATIONS)

- Chien, C.-L. (2024, Sept 30). Financial Literacy Course Adoption. WASHINGTON D.C.: CFP BOARD CONNECTIONS CONFERENCE 2024.
- Chien, C.-L. (2024, Jun 26). Three Financial Psychology Mistakes to Avoid in Business Succession Planning. Diversified Professional Coaching & Ameritas Leadership for the Future Virtual Workshop.
- Chien, C.-L. (2024, Jan 18). Maximizing Retirement Success: Beyond Assets and Liabilities. International Retirement Resources Center.
- Chien, C.-L. (2023, Nov). Buying U.S. Property for Non- U.S. Person. 2023 Knowledge Hub+. The American College of Financial Services.
- Chien, C.-L. (2023, Nov). Maximizing Retirement Success: Beyond Assets and Liabilities. 2023 Knowledge Hub+. The American College of Financial Services.
- Chien, C.-L. (2023, Oct). 3 Financial Psychology Mistakes To Avoid in Business Succession Planning. 2023 Knowledge Hub+. The American College of Financial Services.

- Chien, C.-L. (2023, Sept 22). Future of the Higher Education Leadership. 2023 Clambake and Soldier-Citizen Award Ceremony & Leadership Symposium. The American College of Financial Services. Philadelphia, PA.
- Chien, C.-L. (2023, Aug 8). 3 Financial Psychology Mistakes To Avoid in Business Succession Planning. The 17th Annual Conference of African American Financial Professionals (CAAFP) The American College of Financial Services. Chicago, IL.
- Chien, C.L. (Jun 28, 2023). The 3 Financial Psychology Mistakes in Business Succession Planning. Executive Women of Lake Norman Group.
- Chien, C.-L. (2023, Mar 8). Incorporating Behavioral Finance into Small Business Planning. 2023 Women Working in Wealth Summit and Awards Ceremony. The American College of Financial Services. New York, NY.
- Chien, C.-L. (2022, Oct 20). How to Successfully Navigate Difficult Client Conversations. The American College of Financial Services: Center for Women in Financial Services.
- Chien, C.-L. (2022, Aug 10). Building Community Partnership in "Get Out of Debt and Save (GOODS)" Programs. WASHINGTON D.C.: 2022 CFP BOARD CONFERENCE.
- Chien, C.-L. (2022, July 7). Business Effectiveness Evaluation: Exit / Succession Planning. Professional Business Coaches Alliance (PBCA).
- Chien, C.-L. (2022, May 6). Product Showcase "Improving Your Project Management Skills: The Basics for Success." American Management Association.
- Chien, C.-L. (2021, Oct. 28). Business Effectiveness Evaluation: Exit / Succession Planning. Professional Business Coaches Alliance (PBCA).
- Chien, C.-L. (2021, Oct. 21). Business Coaching Expert-Led Small Group Discussions: Exit/Succession Planning. 2021 Fall Professional Business Coaches Alliance (PBCA) Conference
- Chien, C.-L. (2021, July 23). WIFS Partner Panel - Changing: Self-Awareness. Women in Insurance & Financial Services.
- Chien, C.-L. (2021, Apr 23). WIFS Fireside Chat Panel Discussion-Changing: Leadership. Women in Insurance & Financial Services.
- Chien, C.-L. (2021, Mar 06). The 6th Annual Women's Forum. Women in Insurance & Financial Services-Los Angeles and National Association of Insurance and Financial Advisors-Great Foothills.
- Chien, C.-L. (2021, Jan 28). WIFS Fireside Chat Panel Discussion-Changing: Culture. Women in Insurance & Financial Services.
- Chien, C.-L. & Thiel, J. (2020, Dec 15). Experiential Learning Through Pro Bono Financial Planning Consulting. 2020 REGISTERED PROGRAMS CONFERENCE – VIRTUALLY (Wash DC).
- Chien, C.-L. & Thiel, J. (2020, Dec 3). Personal Financial Planning Careers. UCLA Extension – VIRTUALLY (Los Angeles).
- Chien, C.-L. (2020, Jul 08). Successfully Pivoting to Preserve Your Project. American Management Association - New York.
- Chien, C.-L. (2020, Apr 23). Selling a Planning Practice: The Relationship between Revenue Multiple and Revenue Size. National Association of Insurance and Financial Advisors - Los Angeles.
- Chien, C.-L. (2020, Apr 02). Enhancing Retirement Success Rates in The United States. Women in Insurance & Financial Service - Los Angeles.
- Chien, C.-L. (2020, Jan. 23). The Future of Advising in Light of Automation. The Conejo Valley Estate Planning Council: Through the Looking Glass Symposium XVI, California State University, Channel Islands.
- Chien, C.-L. (2020, Jan. 08). The Future of Advising. Women in Insurance & Financial Services: WIFS Education Webinar, Albany, NY

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- Chien, C.-L. (2019, Nov 13). Diversity Program Case Studies. The CFP Board Center for Financial Planning, 2019 DIVERSITY SUMMIT. Washington, D.C.
- Chien, C.-L. (2019, Oct 21). Enhancing Retirement Success Rates in the United States. FPA Student Club at West Texas A&M University. Canyon, TX.
- Chien, C.-L. (2019, May 22). Near retirement? What are some practical strategies for preparing for retirement? California Lutheran University: Campus Community Day, Thousand Oaks, CA.
- Chien, C.-L. (2019, May 17). Selling Financial Planning Practice. Financial Planning Association Ventura County: Quarterly Chapter Meeting at Spanish Hills Country Club, Camarillo, CA.
- Chien, C.-L. (2019, April 29). Future of Financial Advising. University Village (UVTO), Thousand Oaks, CA.
- Chien, C.-L. (2019, April 10). Leverage Financial Planning to grow business. Women in Insurance & Financial Services: WIFS Education Webinar, Albany, NY.

NON-ACADEMIC PUBLICATIONS

- Chien, C.-L. (2025, Jun 04). How Retirees Can Pay for Big Trips Using Monthly Cash Flow. Retrieved from Value Growth Institute Retirement in Spending Blog: https://vgi168.com/how-retirees-can-pay-for-big-trips-using-monthly-cash-flow/
- Chien, C.-L. (2025, Jun 02). The Retirement Asset No One Talks About. Retrieved from Value Growth Institute Retirement in Spending Blog: https://vgi168.com/the-retirement-asset-no-one-talks-about/
- Chien, C.-L. (2025, Nov 02). The Courage to Keep Living Fully. Retrieved from Value Growth Institute Retirement in Spending Blog: https://vgi168.com/the-courage-to-keep-living-fully/
- Chien, C.-L. (2025, Oct 19). I Planned Our Retirement Alone. Retrieved from Value Growth Institute Retirement in Spending Blog: https://vgi168.com/i-planned-our-retirement-alone/
- Chien, C.-L. (2025, Oct 19). My Husband's Retirement Plan Is Just One Word. Retrieved from Value Growth Institute Retirement in Spending Blog: https://vgi168.com/my-husbands-retirement-plan-is-just-one-word/
- Chien, C.-L. (2024, Nov 18). Helping Your Clients Select the Best Retirement Housing Options. Retrieved from Financial Advisor » FA Online: https://www.fa-mag.com/news/helping-your-clients-select-the-best-retirement-housing-options-80367.html
- Chien, C.-L. (2024, Mar 10). Reimagining Retirement: Work, Wisdom, and Well-being. Retrieved from Value Growth Institute Blog: https://vgi168.com/reimagining-retirement-work-wisdom-and-well-being/
- Chien, C.-L. (2024, Feb 18). Retire Smart, Not Broke: How to Avoid Overspending in Retirement. Retrieved from Value Growth Institute Blog: https://vgi168.com/retire-smart-not-broke-how-to-avoid-overspending-in-retirement/
- Chien, C.-L. (2024, Jan 21). Revolutionizing Retirement: A Holistic Approach to Financial Planning. Retrieved from Value Growth Institute Blog: https://vgi168.com/revolutionizing-retirement-a-holistic-approach-to-financial-planning/
- Chien, C.-L. (2023, Nov 21). Navigating Real Estate Investments for Non-US Persons. Retrieved from Value Growth Institute Blog: https://vgi168.com/navigating-real-estate-investments-for-non-us-persons/
- Chien, C.-L. (2023, Aug). Be Aware of 3 Pitfalls in Business Succession Planning. CalBroker magazine. Retrieved From: https://issuu.com/californiabrokermagazine/docs/california_broker_magazine_august_2023/s/29406856
- Chien, C.L. (2023, Mar 28). Older Adults' Guide to Income Streams and Money Management in Retirement. MoneyGeek. Retrieved From: https://www.moneygeek.com/financial-planning/income-streams-in-retirement/#expert=chia-li-chien-phd-cfp-pmp-cpbc.

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- Chien, C.L. (2023, Mar 23). Financial Playbook for Married Couples. Expert Tips on Marriage and Personal Finance. MoneyGeek. Retrieved From: https://www.moneygeek.com/financial-planning/finances-after-marriage/#expert=chia-li-chien-phd-cfp-pmp-cpbc.
- Chien, C.-L. (2022, June). Working Less Might be Better for your Financial and Mental Health. CalBroker magazine. https://www.calbrokermag.com/more/how-working-less-might-be-better-for-your-financial-and-mental-health/.
- Chien, C.L. (2022, Apr 12). Navigating Life Insurance for Estate Planning. Expert Insight on Life Insurance and Estate Planning. MoneyGeek. Retrieved From: https://www.moneygeek.com/insurance/life/estate-planning-and-life-insurance/#expert=chia-li-chien-phd-cfp-pmp-cpbc.
- Chien, C.L. (2022, Apr 10). Refinancing Your Mortgage. Expert Insight on Mortgage Refinancing. MoneyGeek. Retrieved From: https://www.moneygeek.com/mortgage/refinance/#expert=chia-li-chien-phd-cfp-pmp-cpbc.
- Chien, C.L. (2022, Jan 24). Ask the Experts: 2022's Best States to Retire. WalletHub. Retrieved from: https://wallethub.com/edu/best-and-worst-states-to-retire/18592#expert=Chia-Li_Chien.
- Chien, C.L. (2022, Jan 17).Reverse Mortgage Question & Answers. MoneyGeek. Retrieved From: https://www.moneygeek.com/mortgage/reverse/#expert=chia-li-chien-phd-cfp-pmp-cpbc.
- Chien, C.-L. (2021, Aug 21). The Mental Health Trade-Off: When Spending More Money Might Be The Right Choice. Retrieved from Value Growth Institute Succession Blog.
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- Chien, C. (2010, August 04). Innovate or Be Crushed. Women Entrepreneur Magazine.
- Chien, C. (2010, July 29). What's Your $1 Million Business Worth? Women Entrepreneur Magazine.
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GRANT FUNDING & AWARDS

- CBC Federal Credit Union $17,100 Sponsorship for NRC950 Introduction of Personal Finance for working adults. Oct 2020 to May 2021.
- 2020 American Book Award Winner in the Business: Personal Finance/Investing category on Nov. 20, 2020. (Blind peer-reviewed book "Enhancing Retirement Success Rates in the United States")
- 2020 International Book Award Finalist on July 31, 2020. (Blind peer-reviewed book "Enhancing Retirement Success Rates in the United States")
- The School of Management Advisory Council Awards for Outstanding Achievements honored Chia-Li Chien for Research on Oct. 1, 2020.
- California Lutheran University Community Leaders Association $2,500 grant. 2019-2020.

HONORS AND AWARDS

- The School of Management Advisory Council Awards for Outstanding Achievements honored Chia-Li Chien for Research on Oct. 1, 2020.
- Best Book Awards:
    - Enhancing Retirement Success Rates in the United States
        - 2020 American Book Award Winner in the Business: Personal Finance/Investing category on Nov. 20, 2020
        - 2020 International Book Award Finalist on July 31, 2020.
    - Work toward reward
        - New England Book Festival on Dec 23, 2013
        - Southern California Book Festival on Oct 05, 2013
        - DIY Book Festival on July 08, 2013
        - New York Book Festival on June 10, 2013
        - International Book Awards on May 20, 2013
        - SAN FRANCISCO BOOK FESTIVAL on May 6, 2013
        - Great Southeast Book Festival on March 6, 2013
    - Show me the money
        - Best Books Awards on October 26, 2010
        - New England Book Festival on December 28, 2010

HOST OF NEXTGEN MENTORING FORUM (WEBINARS)

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- The mission of the Mentoring Forum series is to empower, educate, and illuminate individuals who are interested in the Financial Planning industry. At each forum, I interviewed an expert to discuss a topic in the field of financial planning with the purpose of inspiring critical thought and discussion. Each YouTube interview listed below includes a blog article.
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- Chien, C.L. & Rehl, Kathleen. (Jan 18, 2022). How can financial planners assist clients to create T-CRUT?. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/how-can-financial-planners-assist-clients-in-establishing-a-t-crut-with-dr-kathleen-m-rehl-ph-d-cfp-ceft-01182022/.
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- Chien, C.L. & Rehl, Kathleen M. (11/09/2021). What Matters the Most? Help Your Clients Write Legacy Letters for Family and Friends with Kathleen M. Rehl, Ph.D., CFP®, CeFT®. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/what-matters-the-most-with-kathleen-m-dr-rehl-ph-d-cfp-ceft-11092021/.
- Chien, C.L. & Cousineau, Jake. (11/02/2021). Changing Your Financial Behaviors Through Stories with Jake Cousineau. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/changing-your-financial-behaviors-through-stories-with-jake-cousineau-11022021/.
- Chien, C.L. & Cosentino, Eric W. (10/19/2021). Why you should consider using a Trust company to manage your assets? with Eric W. Cosentino, CTFA. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/investment-in-a-trust-vs-trust-management-with-eric-w-cosentino-ctfa-10192021/.
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- Chien, C.L. & Fortin, Julie. (Mar 11, 2021). Integrating Interpersonal Neurobiology into Financial Planning. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/how-to-integrate-interpersonal-neurobiology-into-financial-planning-030221/.
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- Chien, C.L. & Kratz, Julie. (Feb 02, 2021). Lead like an Ally. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/lead-like-an-ally-020221/.
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- Chien, C.L. & Beckstrom,Carrie. (Sep 18, 2020). How to Use Financial Counseling and Coaching Skills to Help Your Clients? NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/how-to-use-effective-communication-to-lead-clients/.

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- Chien, C.L. & Courain, Kathryn. (May 12, 2020). A Niche of COIs. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/a-niche-with-cois/.
- Chien, C.L., Gifford-Ewing, Anne, & Ruderman, Jeff. (May 07, 2020). Planning in a Pandemic: What Your Clients Should Do Now. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/planning-in-a-pandemic-what-your-clients-should-do-now/.
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- Chien, C.L. (Apr 02, 2020). WIFS LA: Enhancing Retirement Success Rates In The United States. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/wifs-enhancing-retirement-success-rates-in-the-united-states/
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- Chien, C.L. (Jan 28, 2020). How successful are U.S. retirees? NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/enhancing-retirement-success-rates-in-the-united-states/.
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- Chien, C.L. & Karakachian, Hratch J. (November 13, 2019). 2019 Year End Tax planning. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/year-end-tax-planning-hratch-karakachian/.
- Chien, C.L. & Combs, Ed. (October 30, 2019). What is Financial Infidelity? What to do with them? NextGen Mentoring Forum.

- Chien, C.L. & Panesis, Michael S. (October 17, 2019). Start-up tips in Financial Planning. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/mike-panesis-executive-director-for-entrepreneurship/.
- Chien, C.L. & Ros, Juan C. (October 10, 2019). A Niche Finds You. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/interview-juan-ros-cfp-financial-advisor-forum-financial-management/.
- Chien, C.L. & Lang, Jeffery. (September 19, 2019). Leveraging FINTECH in Your Firm. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/how-to-leverage-fintech-in-your-firm-jeffrey-lang-phd-candidate-ms-cfp/.
- Chien, C.L. & Courain, Kathryn. (September 05, 2019). A Niche of COIs. NextGen Mentoring Forum. Retrieved From: https://blogs.callutheran.edu/financial-planning-webinars/a-niche-with-cois/.

TEACHING

- Texas Tech University
  - PFP 3486 - Wealth Management
- California Lutheran University (Bachelor/MBA Finance)
  - MFP521 Introduction to Financial Planning (graduate)
  - MFP525 Employee Benefit and Retirement Planning (graduate)
  - MFP598 Capstone Course in Financial Planning (graduate)
  - MFP534 Financial Planning for Small and Family Businesses (graduate)
  - MFP545 Financial Behavior (graduate)
  - UNIV101 First Year Seminar (undergraduate)
- Ball State University
  - BUS300 Principal of Corp. Finance (undergraduate)
  - BUS498 Financial Planning–Capstone (undergraduate)
- University of People
  - BUS 4401: Entrepreneurship II (undergraduate)
  - BUS 2204: Personal Finance (undergraduate)

COURSES DEVELOPED

- The American College of Financial Services
  - MSFP 650 Capstone Case Development (graduate)
  - MSFP 554 Income Taxation (graduate)
  - MSFP 558 Investment Planning (graduate)
  - MSMT 500 Graduate Orientation (graduate)
  - MSFP631 Advanced Retirement Planning Issues (graduate)
  - MSFP615 Advanced Estate Planning (graduate)
  - MSFP 589 Financial Statement Analysis and Business Valuation (graduate)
  - MSFP 584 Executive Compensation (graduate)
  - MSFP 595 Advanced Portfolio Management (graduate)
  - MSFP 585 Building and Managing a Financial Advisory Practice (graduate)
  - MSFP 583 Business Succession Strategies (graduate)
  - MSFP 536 Behavioral Finance (graduate)
  - MSFP 591 Financial Psychology (graduate)
  - MSFP 592 Financial Therapy & Counseling (graduate)
  - MSFP 598 Applied Research in Financial Planning (graduate)

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    - GS839 Planning for Philanthropic Impact in the Context of Family Wealth (graduate)
- California Lutheran University (Bachelor/MBA Finance)
    - MFP530 International (cross-border) Estate Planning (graduate)
    - MFP538 Financial Counseling (graduate)
    - MFP522 Tax Planning (graduate)
    - MFP542 Investment Planning (graduate)
    - MFP539 Practice Management (graduate)
    - UNIV102 Introduction to Personal Finance (available to all undergraduate students)
- Ball State University
    - BUS498 Financial Planning–Capstone (undergraduate)

UNIVERSITY SERVICES

- Texas Tech University
    - College of Health and Human Sciences
        - Teaching Effectiveness, 2026-2027
    - School of Financial Planning
        - Executive, 2026-2027
        - Fundraising/Development, 2026-2027
        - Scholarship Committee, 2026-2027
    - Center for Financial Responsibility
        - KEY AAB, 2026-2027
    - Personal Financial Planning Unit
        - Student Managed Portfolio, 2026-2027
- The American College of Financial Services
    - Academic Leadership Team, 2022-2025.
    - Provost Council, 2022-2025.
    - Effectiveness & Assessment Committee, 2022-2025.
- California Lutheran University
    - Faculty search committee, 2018-2022.
    - Chair & member of the Graduate Academic Standards Committee, 2020-2022.

SERVICES IN THE FINANCIAL PLANNING PROFESSION (INDUSTRY)

- Past Member of The Credentialing Body Advisory Council of WORKCRED an affiliate of ANSI (the American National Standards Institute). 2025-2026.
- Past Member of IAR CE Industry Advisory Committee. 2025-2026.
- Past Chair & member on Education at the Certified Financial Planner Board of Standards, Inc. 2022-2025
- Past National board director of Women in Dance 2023-2025.
- Past National board director of Women in Insurance & Financial Services Association, 2020-2021.
- Past subject matter expert for CFP Board Exam Item writer & reviewed, 2019-2021.
- Past Chair & President of the Financial Planning Association (FPA) of Charlotte. 2013-2014.
- Past Chair of the Pro Bono Advisory Committee for the FPA on the national level, 2011-2012.
- Treasurer of Carolina Refugee Resettlement Agency. 2012.

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1301 Akron Ave, CHHS 252, Lubbock, Texas 79409

- Pro Bono Director for the FPA of Charlotte. 2009-2010. Pro Bono project benefactors include CharlotteSave, the Charlotte Housing Authority, the city of Charlotte, Goodwill Piedmont, Habitat for Humanity, and many local nonprofit community organizations.
- Appointed board member of Women's Advisory Board (WAB) in Mecklenburg County for Board of County Commissioners in North Carolina. 2009-2012.
- Community Advisors for Women's Inter-Cultural Exchange. 2010-2012.
- Volunteer mentor for SCORE and counsels hundreds of start-up and mature small businesses nationwide. 2010-2013.
- VITA Charlotte. 2005-2015.

PRO BONO FINANCIAL PLANNING SERVICES (OUTREACH AND ENGAGEMENT)

- Volunteer Financial Planner at PREPARE + PROSPER, 2025 Tax Season.
- CBC Federal Credit Union: One college-level financial education course offered to 32 employees of CBC Federal Credit Union and California Lutheran University. (2021)
- Ventura County Lodging Association (VCLA): Short-Term Assets Management project with six MBA FP students. (2019)
- Pro Bono Succession Planning Service
  - One Raleigh, NC, financial service company from Jan 2024 to Aug 2024.
  - One Thousand Oaks, CA, financial service company from Oct 2018 to May 2019 in exit transition and employee succession.
  - One Thousand Oaks, CA, financial service company in June 2019 in buyout option.
  - One Thousand Oaks, CA, financial service company in Dec 2019 & May 2022 in M&A options and employee succession.
  - One Phoenix, AZ financial service company in Feb 2020 in M&A options.
- Pro Bono Financial Planning Service (* indicated students involved project)
  - *One CLU faculty household in Simi Valley, CA from April to June 2019.
  - *One Thousand Oaks, CA household in July – Sept 2019
  - *One Malibu, CA household from Oct to Dec 2020
  - One Arlington, VA disabled single individual from Feb to March 2021.
  - *One CLU faculty household in Moorpark, NC from July to Sept 2021.