Curriculum Vitae

Russell N. James III

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Research

Topics: Decision making in gifts, estates, and property
Methods: Econometric analysis of large datasets; neuroimaging; in-person and online experiments

Employment

Texas Tech University, Department of Personal Financial Planning, Lubbock, TX **2010-present**
Professor and CH Foundation chair (2013-present); Associate Professor (2010-2013)
Director of Graduate Studies in Charitable Financial Planning

University of Georgia, Department of Financial Planning, Housing & Consumer Economics, Athens, GA **2006-2010**
Assistant Professor (*Affiliated faculty member: University of Georgia Institute for Nonprofit Organizations*)

University of Missouri, Department of Personal Financial Planning, Columbia, MO **2005-2006**
Visiting Assistant Professor (2005-2006); Adjunct Instructor (1998-1999); *Teaching estate and gift planning*

Central Christian College, Moberly, MO **1994-2005**
President (2000-2005)
Direct and supervisory responsibility for all fundraising. College successfully completed two major capital campaigns, built several new debt-free buildings, and more than tripled enrollment.
Director of Planned Giving (1995-2000); Assistant Director of Planned Giving (1994-1995)
Teaching Faculty Member (1994-2005) *courses included Principles of Finance & Law, Microeconomics*

Law Offices of Russell James, Moberly, MO and Kansas City, MO **1994-2000**
Practice limited to gifts, estates, and property law

U.S. Attorney's Office (U.S. Department of Justice), Law Clerk, Kansas City, MO **1993**

Stinson LLP (*known then as Stinson Mag & Fizzell*), Law Clerk, Kansas City, MO **1992, 1993**

Education

Ph.D., Consumer & Family Economics, University of Missouri, Columbia, MO **2002**
Dissertation: Sects, rationality, and human capital in religious charitable giving

J.D., University of Missouri School of Law, Columbia, MO **1994**
Member of Missouri Law Review; Order of the Coif; Graduated in top 2% of class
United Missouri Bank Award: Most Outstanding Work in Gift and Estate Taxation and Planning
American Jurisprudence Award: Property Law I, Property Law II, and Federal Income Tax Law

B.A., Economics, University of Missouri, Columbia, MO **1992**

Licenses & Certificates
Member of the Missouri Bar **1994-present**
Certified Financial Planner ® **2010-present**

Academic Journal Articles (available on request – please email)

Decision Making in Gifts and Estates

1. Wishart, R. & James, R. N., III. (2021). The final outcome of charitable bequest gift intentions: Findings and implications for legacy fundraising. Journal of Philanthropy & Marketing. 26(4), e1703.
2. Hussein, R. & James, R. N., III. (2021). Encouraging living will completion using social norms and family benefit. Financial Services Review. 29(2), 85-99.
3. Yan, Y. & James, R. N., III. (2021). Framing the annuity as bequest protection: An experimental test. Financial Services Review. 29, 277-291.
4. Liu, Y. & James, R. N., III. (2021). Mortality salience lowers preferred retirement asset decumulation rates. Journal of Personal Finance. 20(1), 67-78.
5. James, R. N., III. (2020). The emerging potential of longitudinal empirical research in estate planning: Examples from charitable bequests. UC Davis Law Review, 53, 2397-2431.
6. James, R. N., III. (2020). American charitable bequest transfers across the centuries: Empirical findings and implications for policy and practice. Estate Planning & Community Property Law Journal, 12, 235-285.
7. Lehman, J. & James, R. N., III. (2020). Charitable bequest importance among donors to different types of charities. International Journal of Nonprofit and Voluntary Sector Marketing. 25(2), e1657
8. Liu, Z., James, R. N., III, & Aboohamidi, A. (2020). Finding the next major donor: The relationship between financial planning horizon and charitable giving. Journal of Personal Finance. 19(2), 47-64.
9. James, R. N., III. (2019). Using donor images in marketing complex charitable financial planning instruments: An experimental test with charitable gift annuities. Journal of Personal Finance. 18(1), 65-74.

10. James, R. N., III. (2019). Encouraging repeated memorial donations to a scholarship fund: An experimental test of permanence goals and anniversary acknowledgements. Philanthropy and Education. 2(2), 1-28.
11. Williams, J. & James, R. N., III. (2019). Bequest provision preferences in commercial annuities: An experimental test of the role of mortality salience. Journal of Financial Counseling and Planning. 30(1), 121-131.
12. James, R. N., III. (2018). Cash is not king for fundraising. Gifts of noncash assets predict current and future contributions growth. Nonprofit Management & Leadership. 29(2), 159-179.
13. James, R. N., III. (2018). Creating understanding and interest in charitable financial planning and estate planning: An experimental test of introductory phrases. Journal of Personal Finance. 17(2), 9-22.
14. James, R. N., III. (2018). Increasing charitable donation intentions with preliminary importance ratings. International Review on Public and Nonprofit Marketing. 15(3), 393-411.
15. James, R. N., III. (2018). Describing complex charitable giving instruments: Experimental tests of technical finance terms and tax benefits. Nonprofit Management & Leadership. 28(4), 437-452.
16. Lehman, J. & James, R. N., III. (2018). The charitable bequest gap among African-Americans: Exploring charitable, religious, and family estate planning attitudes. Journal of Personal Finance. 17(1), 43-56.
17. James, R. N., III. (2017). Natural philanthropy: A new evolutionary framework explaining diverse experimental results and informing fundraising practice. Palgrave Communications. DOI: 10.1057/palcomms.2017.50
18. James, R. N., III. (2017). An economic model of mortality salience in personal financial decision making: Applications to annuities, life insurance, charitable gifts, estate planning, conspicuous consumption, and healthcare. The Journal of Financial Therapy. 7(2), 62-82.
19. James, R. N., III. (2016). Testing the effectiveness of fundraiser job titles in charitable bequest and complex gift planning. Nonprofit Management and Leadership. 27(2), 165-179.
20. James, R. N., III & Routley, C. (2016). We the living: The effects of living and deceased donor stories on charitable bequest giving intentions. International Journal of Nonprofit and Voluntary Sector Marketing, 21(2), 109-117.
21. James, R. N., III. (2016). Phrasing the charitable bequest inquiry. Voluntas: International Journal of Voluntary and Nonprofit Organizations, 27(2), 998-1011.
22. James, R. N., III. (2016). The new statistics of estate planning: Lifetime and post-mortem wills, trusts, and charitable planning. The Estate Planning & Community Property Law Journal, 8(1), 1-39.
23. Guillemette, M. A., Martin, T. K., Cummings, B. F., & James, R. N. (2016). Determinants of the stated probability for longevity insurance. The Geneva Papers on Risk and Insurance - Issues and Practice, 41, 4-23.
24. James, R. N., III. (2015). The family tribute in charitable bequest giving: An experimental test of the effect of reminders on giving intentions. Nonprofit Management and Leadership, 26(1), 73-89.
25. James, R. N., III & Baker, C. (2015). The timing of final charitable bequest decisions. International Journal of Nonprofit and Voluntary Sector Marketing, 20, 277-283.
26. James, R. N., III & O'Boyle, M. W. (2014). Charitable estate planning as visualized autobiography: An fMRI study of its neural correlates. Nonprofit and Voluntary Sector Quarterly, 43(2), 355-373.
27. Wiepking, P. & James, R. N., III. (2013). Why are the oldest old less generous? Explanations for the unexpected age-related drop in charitable giving. Ageing & Society, 33(3), 486-510.
28. James, R. N., III, & Baker, C. (2012). Targeting wealthy donors: The dichotomous relationship of housing wealth with current and bequest giving. International Journal of Nonprofit and Voluntary Sector Marketing, 17(1), 25-32.
29. James, R. N., III. (2011). Cognitive skills in the charitable giving decisions of the elderly. Educational Gerontology, 37(7), 559-573.
30. James, R. N., III. (2011). Charitable giving and cognitive ability. International Journal of Nonprofit and Voluntary Sector Marketing, 16(1), 70-83.
31. James, R. N., III, & Jones, K. S. (2011). Tithing and religious charitable giving in America. Applied Economics, 43(19), 2441-2450.
32. James, R. N., III. (2010). Charitable estate planning and subsequent wealth accumulation: Why percentage gifts may be worth more than we thought. International Journal of Educational Advancement, 10(1), 24-32.
33. James, R. N., III. (2009). Health, wealth, and charitable estate planning: A longitudinal examination of testamentary charitable giving plans. Nonprofit and Voluntary Sector Quarterly, 38(6), 1026-1043.
34. James, R. N., III. (2009). The myth of the coming charitable estate windfall. The American Review of Public Administration, 39(6), 661-674.
35. James, R. N., III. (2009). Wills, trusts, and charitable estate planning: A panel study of document effectiveness. Journal of Financial Counseling & Planning, 20(1), 3-14.
36. James, R. N., III. (2009). An econometric analysis of household political giving in the USA. Applied Economics Letters, 16(5), 539-543.
37. James, R. N., III., Lauderdale, M. K., & Robb, C. A. (2009). The growth of charitable estate planning among Americans nearing retirement. Financial Services Review, 18(2), 141-156.
38. James, R. N., III., & Wiepking, P. (2008). A comparative analysis of educational donors in the Netherlands. International Journal of Educational Advancement, 8(2), 71-79.

39. James, R. N., III. (2008). Charitable giving and the financial planner: Theories, findings, and implications. Journal of Personal Finance, 6(4), 98-117.
40. James, R. N., III. (2008). Distinctive characteristics of educational donors. International Journal of Educational Advancement, 8(1), 3-12.
41. James, R. N., III., & Sharpe, D. L. (2007). The nature and causes of the U-shaped charitable giving profile. Nonprofit and Voluntary Sector Quarterly, 36(2), 218-238.
42. James, R. N., III., & Sharpe, D. L. (2007). The "sect-effect" in charitable giving: Distinctive realities of exclusively-religious charitable givers. The American Journal of Economics and Sociology, 66(4), 697-726.
43. James, R. N., III. (2006). Multi-family housing, social capital, and charitable behavior: Does spatial connectedness influence social connectedness? Housing and Society, 33(2), 91-104.

Decision Making in Property

44. James, R. N., III. & O'Boyle, M. W. (2019). Graffiti and perceived neighborhood safety: A neuroimaging study. Property Management, 37, 69-81.
45. James, R. N., III, Atiles, J. H., & Robb, C. A. (2011). Homeownership plans among Hispanic renters: Ethnic differences or geographic differences? Housing and Society, 38(2), 205-223.
46. James, R. N., III. & Sweaney, A. L. (2010). Housing dissatisfaction and cognitive decline in older adults. Journal of Housing for the Elderly, 24(1), 93-106.
47. James, R. N., III. (2010). The origin of spaces: Understanding residential satisfaction from ape nests, human cultures, and the hierarchy of natural housing functions. Housing, Theory, and Society, 27(4), 279-295.
48. James, R. N., III. (2009). Customer satisfaction with apartment housing offered by Real Estate Investment Trusts (REITs). International Journal of Consumer Studies, 33, 572-580.
49. James, R. N., III., Carswell, A. T., & Sweaney, A. L. (2009). Sources of discontent: Residential satisfaction of tenants from an internet ratings site. Environment & Behavior, 41(1), 43-59.
50. James, R. N., III. (2009). Tenant time preference as a barrier to homeownership. Applied Economics Letters, 16(10), 1073-1077.
51. Carswell, A. T., James, R. N., III, & Mimura, Y. (2009). Examining the connection between housing counseling practices and long-term housing and neighborhood satisfaction. Journal of the Community Development Society, 40(1), 37-53.
52. Parks, K. E., Carswell, A. T., & James, R. N., III. (2009). Residential satisfaction of military households in privatized apartment communities. Housing and Society, 36(1), 95-114.
53. James, R. N., III. (2008). Residential satisfaction of elderly tenants in apartment housing. Social Indicators Research, 89, 421-437.
54. James, R. N., III. (2008). The impact of subsidized rental housing characteristics on metropolitan residential satisfaction. Journal of Urban Planning and Development (ASCE), 134(4), 166-172.
55. James, R. N., III. (2008). Investing in housing characteristics that count: A cross-sectional and longitudinal analysis of bathrooms, bathroom additions, and residential satisfaction. Housing and Society, 35(2), 67-82.
56. James, R. N., III. (2008). An economic model of asymmetric information, dissatisfaction, and resident turnover in rented multifamily housing. Housing and Society, 35(1), 59-76.
57. James, R. N., III., & Carswell, A. T. (2008). Home sweet apartment: A text analysis of satisfaction and dissatisfaction with apartment homes. Housing and Society, 35(1), 91-111.
58. James, R. N., III, & Zahirovic-Herbert, V. (2008). The impact of a migration shock on tenant satisfaction: The case of Hurricane Katrina and Baton Rouge, Louisiana. Migration Letters, 5(1), 79-88.
59. James, R. N., III., & Atiles, J. H. (2008). The transitioning nature of Hispanic renters. Housing Policy Debate, 19(1), 177-206.
60. James, R. N., III. (2007). Multifamily housing characteristics and tenant satisfaction. Journal of Performance of Constructed Facilities (ASCE), 21(6), 472-480.
61. James, R. N., III., & Sharpe, D. L. (2007). Is time running out? Savings and investments of renters nearing retirement age. Financial Counseling & Planning, 18(2), 61-75.
62. James, R. N., III., & Moorman, D. C. (2007). Bringing an emerging consumer issue to the classroom: The Bisphenol-A (BPA) controversy. Journal of Consumer Education, 24, 53-62.
63. James, R. N., III. (1994). Requiring environmental information disclosure on the deed: Shining the light on residential transactions. Missouri Environmental Law & Policy Review, 2(2), 81-92.

Other Neuro-Economic and Behavioral Economic Decision Making

64. Cummings, B. F., & James, R. N., III. (2022, forthcoming). The impact of financial advisors on the subsequent wealth accumulation of older adults. Journal of Personal Finance.
65. Jai, T-M., Fang, D., Cai, W., Bao, F. S., James, R. N., III, & Chen, T. (2021). Seeing it is like touching it: Unraveling the effective product presentations on online apparel purchase decisions and brain activity (an fMRI study), Journal of Interactive Marketing, 53, 66-79.
66. James, R. N., III. (2015). Exploration-exploitation: A cognitive dilemma still unresolved. Cognitive Neuroscience, 6 (4), 219-221.
67. Guillemette, M. A., Yao, R., & James, R. N., III (2015). An analysis of risk assessment questions based on loss-averse preferences. Journal of Financial Counseling & Planning, 26(1), 17-29.
68. Cummings, B. F., & James, R. N., III (2014). Factors associated with getting and dropping financial advisors among older adults: Evidence from longitudinal data. Journal of Financial Counseling & Planning, 25(2), 129-147. 2015 AFCPE® Journal Article Award Winner
69. Guillemette, M., James, R. N., III, & Larson, J. (2014). Loss aversion under cognitive load. Journal of Personal Finance, 13(2), 72-81.
70. James, R. N., III. (2013). Neuroimaging reveals more “second guessing” of non-CFP® advisors during underperformance. Journal for Financial Planning, 26(2), 52-59.
71. Garrett, S., & James, R. N., III. (2013). Financial ratios and perceived household financial satisfaction. Journal of Financial Therapy, 4(1), 39-62.
72. James, R. N., III. (2012). Choosing and changing financial advisors: An fMRI study of associated brain activations. Journal of Financial Counseling & Planning, 24(2), 3-17.
73. James, R. N., III. (2011). Applying neuroscience to financial planning practice: A framework and review. Journal of Personal Finance, 10(2), 10-65.
74. Bruce, A. S., Bruce, J. M., Schurle, B. W., Zereyesus, J., & James, R. N. III. (2011). Implications of neuroscience developments for teaching agricultural economics/agribusiness. North American Colleges & Teachers of Agriculture Journal, 55(3), 49-53.
75. James, R. N., III., & Cude, B. J. (2009). Trends in Journal of Consumer Affairs feature articles: 1967-2007. Journal of Consumer Affairs, 43(1), 155-169.
76. Robb, C. A., & James, R. N., III. (2009). Associations between individual characteristics and financial knowledge among college students. Journal of Personal Finance, 8(1), 170-184.
77. James, R. N. III. (2008). Consumer satisfaction and the dual-self economic model: Why consumer education can be both informative and transformative. The Forum for Family and Consumer Issues, 13(1).
78. Goetz, J., & James, R. N., III. (2008). Human choice and the emerging field of neuroeconomics. Journal of Personal Finance, 6(4), 13-36.

Non-article publications in academic journals

79. James, R. N., III. (2014). Encyclopedia of housing 2nd edition (review of the book). Journal of Urban Affairs, 36 (1), 158-159
80. James, R. N., III. (2013). Researcher profile: An interview with Russell James, JD, PhD, CFP. Journal of Financial Therapy, 4(2), 64-66
81. James, R. N., III. (2012). Donor-centered planned gift marketing (review of the book). Nonprofit and Voluntary Sector Quarterly, 41(4), 704-706
82. James, R. N., III. (2009). Recreating neighborhoods for successful aging (review of the book). Journal of the American Planning Association, *75*(3), 376.
83. James, R. N., III., & Dull, C. J. (2006). Prelude to leadership: Backgrounds of megachurch leaders (research note). Review of Religious Research, 48(2), 231-232.

Books and Book Chapters

84. James, R. N., III (in press). Planned giving principles. In G. G. Shaker, E. R. Tempel, S. K. Nathan, and W. Stanczykiewicz (Eds.) Achieving excellence in fundraising, Fifth Edition. John Wiley & Sons.
85. James, R. N., III (in press). Planned giving. In K. Kearns and W. Wen-Jiun (Eds.) Encyclopedia of nonprofit management, leadership and governance. Edward Elgar Publishing.
86. James, R. N., III. (2022). The storytelling fundraiser: The brain, behavioral economics, and fundraising story (slides edition). Independently published. Kindle Direct Publishing.
87. James, R. N., III. (2022). The epic fundraiser: Myth, psychology, and the universal hero story in fundraising (slides edition). Independently published. Kindle Direct Publishing.

88. James, R. N., III. (2022). The primal fundraiser: Game theory and the natural origins of effective fundraising (slides edition). Independently published. Kindle Direct Publishing.
89. James, R. N., III. (2022). The Socratic fundraiser: Using questions to advance the donor's story (slides edition). Independently published. Kindle Direct Publishing.
90. Routley, C. & James, R. (2018). Who gives and why? In C. Routley and S. Wilberforce (Eds.), *Legacy and In-Memory Fundraising*. London, England: Directory of Social Change, pp. 15-25.
91. James, R. N. III (2018). Valuation, appraisals, and substantiation. In B. Clontz and R. Raffin (Eds.), *Charitable Gifts of Noncash Assets*. Bryn Mawr, PA: The American College Press.
92. James, R. N. III & Brown, R. A. (2018). *2017 Survey of Charitable Gift Annuities*. Smyrna, GA: American Council on Gift Annuities.
93. James, R. N., III. (2014). United States private rental sector. In A.D.H. Crook and P. Kemp (Eds.), *Private rental housing: Comparative perspectives.* Cheltenham, England: Edward Elgar Publishing, pp. 198-223.

    [Positively reviewed in: Journal of Housing and the Built Environment by Kristof Heylen; Housing, Theory, and Society by Michael Oxley, University of Cambridge; International Journal of Housing Policy by Gerard van Bortel, Delft University of Technology]
94. James, R. N., III. (2014). Residential satisfaction of elderly tenants. In A.C. Michalos (Ed.), *Encyclopedia of Quality of Life and Well-Being Research*. Dordrecht, Netherlands: Springer, pp. 1862-1866.
95. James, R. N., III (2014-present). *Visual Planned Giving: An introduction to the law and taxation of charitable gift planning*. Charleston, S.C.: CreateSpace

    Adopted as a course textbook at Widger School of Law at Villanova University (Christopher Woehrle – LLM program), at North Park University (Sandy MacNab – Planned Giving Course), and The American College of Financial Services (Philip Cubeta - CAP® program)
96. James, R. N., III (2014). *Tenure Hacks*. Independently published. Charleston, S.C.: CreateSpace

    Adopted as a course textbook at Utah State University (Sean Michael – Introduction to the Professoriate)
97. James, R. N., III (2013). *Inside the Mind of the Bequest Donor*. Independently published. Charleston, S.C.: CreateSpace.
98. James, R. N., III (2013). *American Charitable Bequest Demographics, 1992-2012.* Independently published. Charleston, S.C.: CreateSpace.
99. James, R. N., III (2012). Residential satisfaction. In D. Kopec (Ed.), *Environmental psychology for design* (p. 193). New York: Fairchild Books.
100. Robb, C. A., & James, R. N. (2012). Credit cards as a market instrument: Consumer understanding and use. In D. Lamdin (Ed.), *Financial Decisions Across the Lifespan: Problems, Programs, and Prospects* (101-112). New York: Springer.
101. James, R. N., III., Robb, C. A., Carswell, A. T., & Atiles, J. H. (2010). Housing costs among low-income renters and homeowners: 'Rent v. buy' and the hidden costs of low-income homeownership. In S. Kis & I. Balough (Eds.), *Housing, housing costs and mortgages: Trends, impact and prediction.* (pp. 171-179). Hauppauge, NY: Nova Science Publishers.
102. Carswell, A. T. & James, R.N., III. (2010). Housing. In R. Hutchison (Ed.), Encyclopedia of Urban Studies. (pp. 375-379). Thousand Oaks, CA: SAGE Publications.
103. James, R. N., III. (2009). Fair housing advertising & marketing guidelines for apartment managers. In R. Hein (Ed.) *Georgia Apartment Association Law Book* (p. 86-90). Atlanta, GA: Atlanta Apartment Association.
104. James, R. N., III. (2009). Introduction to Georgia apartment law. In R. P. Hein (Ed.) *Georgia Apartment Association Law Book* (p. 11-15). Atlanta, GA: Atlanta Apartment Association.
105. James, R. N., III. (2009). Getting from paper to practice: Apartment management policies and procedures manuals. In R. P. Hein (Ed.) *Georgia Apartment Association Law Book* (p. 39-42). Atlanta, GA: Atlanta Apartment Association.
106. James, R. N., III. (2009) Government regulation of apartment marketing by fax, phone, and e-mail. In R. Hein (Ed.) *Georgia Apartment Association Law Book* (p. 123-125). Atlanta, GA: Atlanta Apartment Association.
107. James, R. N., III. (2009). Sources of apartment law: Where does it all come from? In R. Hein (Ed.) *Georgia Apartment Association Law Book* (p. 43-46). Atlanta, GA: Atlanta Apartment Association.
108. Carswell, A. T. & James, R. N., III. (2009). Affordable housing programs in the apartment industry. In R. Hein (Ed.) *Georgia Apartment Association Law Book* (p. 47-54). Atlanta, GA: Atlanta Apartment Association.

Professional Periodicals

109. James, R. N. (2018, February). How the 2018 tax law increases charitable giving deductions. Financial Advisor. https://www.fa-mag.com/news/how-the-2018-tax-law-increases-charitable-giving-deductions-37426.html
110. James, R. N., III (2017, April). Which words have the most influence in legacy marketing, Remember a Charity Blog (UK National Legacy Campaign) http://www.rememberacharity.org.uk/what-words-have-the-most-influence-in-legacy-marketing/

111. James, R. N., III (2015, December) Elements and timing of a charitable gift – part two, CEG Worldwide Elite Advisor Report, http://www.cegworldwide.com/resources/expert-team/193-cg-russell-james-elements-and-timing-of-a-charitable-gift-prt02
112. James, R. N., III (2015, November) Elements and timing of a charitable gift – part one, CEG Worldwide Elite Advisor Report, http://www.cegworldwide.com/resources/expert-team/192-wt-russel-james-elements-and-timing-of-a-charitable-gift-prt01
113. James, R. N., III (2015, February) Timing of the last will and testament, 48(2), Give & Take, 6-7.
114. Franey, J. W. & James, R. N. (2014, June) Was that their final answer? How charitable plans evolve and mature. Planned Giving Today, 25(6), 1
115. James, R. N., III (2013, December). What's wrong with focusing on bequest intentions from 40-year-olds? Give & Take, 46(12), 3-7 *[circulation 10,000]*
116. James, R. N., III (2013, November). When plans change. Give & Take, 46(11), 3-7
117. James, R. N., III (2012, September/October). Do donor restrictions create more giving? Advancing Philanthropy, 54. *[Association of Fundraising Professionals – Circulation 30,000+]*.
118. James, R. N., III (2012, May). Planned, Major Gifts and the Psychology of Wealth. The Major Gifts Report, 7.
119. James, R. N., III (2012, March/April). Wealth matters. Advancing Philanthropy, 43.
120. James, R. N., III & Katz, D. (2012, February). Giving it away. Financial Planning, 37-38.
121. James, R. N., III. (2012, January/February). Planned giving and the psychology of death. Advancing Philanthrophy, 48.
122. James, R. N., III. (2011, November/December). Do your donors know each other? Advancing Philanthropy, 45.
123. James, R. N., III. (2011, Sept/October). The paradox of empathy. Advancing Philanthropy, 49.
124. James, R. N., III. (2011, July/August). The 'eyes' have it. Advancing Philanthropy, 56.
125. James, R. N., III. (2011, May/June). Touch, trust, and giving. Advancing Philanthropy, 46.
126. James, R. N., III. (2011, January/February). You first: The importance of sequence in gift solicitation. Advancing Philanthropy. 43
127. James, R. N., III. (2010, November/December). Competitive giving. Advancing Philanthropy. 49
128. James, R. N., III. (2010, July/August). This is your brain on charitable giving. Advancing Philanthropy. 54.
129. James, R. N., III. (2010, May/June). Barriers to bequest giving. Advancing Philanthropy. 12-13.
130. James, R. N., III. (2010, March/April). Charitable giving and childlessness. Advancing Philanthropy. 43.
131. James, R. N., III. (2010, January/February). Are you asking often enough? Advancing Philanthropy. 49.
132. James, R. N., III. (2009, November/December). Understanding African-American donors. Advancing Philanthropy. 46.
133. James, R. N., III. (2009, September/October). Perceived benefit: How alumni donations vary with child age. Advancing Philanthropy, 42.
134. James, R. N., III. (2009, July/August). When recognition and reward do not mix. Advancing Philanthropy, 51.
135. James, R. N., III. (2009, May/June). The myth of the coming flood. Advancing Philanthropy, 64.
136. James, R. N., III. (2009, March/April). Do the poor give more? Advancing Philanthropy, 43.
137. James, R. N., III. (2009, January/February). Income and giving. Advancing Philanthropy, 46.
138. James, R. N., III. (2008, November/December). Soliciting donors with a gift. Advancing Philanthropy, 49.
139. James, R. N., III. (2008, September/October). Planned giving: Trends, opportunities and challenges in bequests, endowments and major gifts. Advancing Philanthropy, 48-51.
140. James, R. N., III. (2008, July/August). Fewer recipients = more gifts? Advancing Philanthropy, 47.
141. James, R. N., III. (2008, May/June). After a temporary matching gift expires. Advancing Philanthropy, 64
142. James, R. N., III. (2008, March/April). Stingy baby boomers? Advancing Philanthropy, 42.
143. James, R. N., III. (2007, April 30). The apartment features that generate resident satisfaction. Professional Management *[National Association of Home Builders Multifamily]*. Available at http://www.nahbmonday.com/RAMPM/issues/2007-04-30/5.html
144. Carswell, A. T., James, R. N., III, & Hein, R. (2007, September). Know your neighbor: State and local policy regarding sex offenders has apartment owners wary of liability issues. UNITS, 56-67 *[National Apartment Association]*.
145. James, R. N., III., & Carswell, A. T. (2006, November 17). Residential property management education at research universities. Professional Management *[National Association of Home Builders Multifamily].* Available at http://www.nahbmonday.com/RAMPM/issues/2006-11-16/2.html

Other

146. James, R. N., III & Turner, P. (2010). *Leasing smart in Georgia*. University of Georgia Cooperative Extension Publication. Available at http://www.fcs.uga.edu/ext/pubs/hace/HACE-E-80.pdf

Conference Proceedings

International Academic Conferences

147. James, R. N., III. (2021). The fundraiser as guiding sage in the donor-hero's journey: Managing occupational stigma with story. Heroism Science Conference hosted by University of Limerick, May 27-28, Limerick, Ireland (virtual).
148. James, R. N., III. (presenter) & Baker, C. (co-author). (2015). The timing of final charitable bequest decisions. European Research Network On Philanthropy (ERNOP) 7th International Conference, Interdisciplinary Research On Philanthropy: "Connecting the Dots", July 9-10, Cergy, France.
149. James, R. N. III. (2013). The dichotomous effect of memorial reminders on current and bequest giving intentions: Neuroimaging and survey results. European Research Network on Philanthropy (ERNOP) International Conference: Challenges for Research on Philanthropy – New and Transnational Perspectives, (p. 107), July 11-12, Riga, Latvia.
150. James, R. N. III., Atiles, J. H., Sweaney, A. L., Carswell, A. T., Skobba, K., & O'Boyle, M. (2012). Perceived neighborhood safety: An fMRI study of its neural correlates. European Network of Housing Researchers 2012 International Conference: Housing – Local Welfare and Local Markets in a Globalised World: Book of Abstracts, (p. 142), June 24-27, Lillehammer, Norway.
151. James, R. N. III. (2012). An overview of the post-crash private rental sector and homeownership preferences in the United States: Lessons to inform policy in a European context. European Network of Housing Research Private Rented Markets Seminar, (pp. 103-152), March 29-30, 2012, Jesus College, University of Oxford, England, U.K.
152. James, R. N. III. (2010). Giving culture and planned giving. Giving Korea: The 10th International Symposium on Giving Culture (p. 109-158), October 22, Seoul, Korea.
153. Wiepking, P. & James, R. N. III. (2010). An exploration of the mediating effect of cognitive ability on predictors of charitable giving. Ninth International Conference of the International Society for Third Sector Research (ISTR), (p. 2-3) July 7-10, Istanbul, Turkey. Abstract at http://www.istr.org/Abstracts2010/pdf/ISTR2010_0653.pdf
154. James, R. N., III & Atiles, J. H. (2009). The private rental sector and immigrant populations: The case of homeownership plans among Hispanic renters in the U.S. Changing Housing Markets, Integration and Segmentation: European Network of Housing Researchers 2009 International Conference (p. 58), June 28-July1, Prague, Czech Republic.
155. James, R. N., III. (2009). Residential satisfaction and cognitive decline among older adults. Changing Housing Markets, Integration and Segmentation: European Network of Housing Researchers 2009 International Conference (p. 148), June 28-July1, Prague, Czech Republic.
156. James, R. N., III, Carswell, A. T., & Robb, C. A. (2009). Consumers, consumer information and the home ownership decision: The importance of hidden costs. 4th International Consumer Sciences Research Conference (p. 80-83), June 24-26, Edinburgh, Scotland, United Kingdom.
157. James, R. N., III. (2009). Consumer satisfaction in the brave new world of REIT-owned apartments. 4th International Consumer Sciences Research Conference (p. 211), June 24-26, Edinburgh, Scotland, United Kingdom.
158. James, R. N., III. (2009). The private rental sector in the US: Comparisons and examples for European policy. European Network of Housing Researchers Working Group on Private Rented Markets: Proceedings of Seminar on the Private Rented Sector (p. 107-198), April 27-28, York, England, United Kingdom.
159. James, R. N., III, & Sweaney, A. L. (2008). Satisfaction in senior housing: The differential impact of private rental sector apartments. Shrinking Cities, Sprawling Suburbs, Changing Countrysides: European Network of Housing Researchers 2008 International Conference, Book of Abstracts (p. 227), July 6-9, Dublin, Ireland.
160. Sweaney, A. L., & James, R. N., III. (2008). REITs and the residential satisfaction of private rental sector tenants on an internet ratings site. Shrinking Cities, Sprawling Suburbs, Changing Countrysides: European Network of Housing Researchers 2008 International Conference, July 6-9, Book of Abstracts (p. 230), July 6-9, Dublin, Ireland.
161. James, R. N., III. (2008). Asymmetric information and the determinants of tenant satisfaction in the US private rental market. European Network of Housing Researchers Workshop on Private Rented Markets: Programme, Papers, & Presentations (pp. 42-79), January 21-22, Dublin, Ireland.
162. James, R. N. III. (2007). Tenant satisfaction and structural characteristics of multifamily housing in the U.S. Sustainable Urban Areas: European Network of Housing Researchers 2007 International Conference, Book of Abstracts (pp. 88), June 25-28, Rotterdam, Netherlands.
163. James, R. N. III. (2007). The household, metropolitan, and international impact of public housing on residential satisfaction. Sustainable Urban Areas: European Network of Housing Researchers 2007 International Conference, Book of Abstracts (pp. 88-89). June 25-28, Rotterdam, Netherlands.

U.S. Academic Conferences

164. Liu, Y., & James, R. N. III. (2020). Gratitude, money, and generosity: When naming good things leads to doing good. Academy of Financial Services, October 1, 2020. [online]
165. Liu, Y., & James, R. N. III. (2020). Household bargaining between married couples regarding charitable giving. The Academic Research Colloquium - 2020 CFP Board Conference. February 20-22, 2020, Arlington, Virginia.
166. Liu, Y., & James, R. N. III. (2020). Should we spend all of our money in retirement? A surprise reason why we don't and a new solution. The Academic Research Colloquium - 2020 CFP Board Conference. February 20-22, 2020, Arlington, Virginia.
167. Liu, Y., & James, R. N. III. (2019). The effect of mortality salience on asset decumulation decisions. Association for Financial Counseling & Planning Education (AFCPE), November 19-21, 2019, Portland, OR.
168. Liu, Y., & James, R. N. III. (2019). Married Couples making Charitable Giving decisions? Academy of Financial Services Annual Conference, October 15-16, 2019, Minneapolis, MN.
169. James, R. N. III. (2019). Empirical analysis of charitable estate transfers: Past results, new findings, and the emerging potential of longitudinal research. American College of Trusts and Estates Counsel (ACTEC) Symposium: An Empirical Analysis of Wealth Transfer Law, October 11, 2019, UC-Davis School of Law, Davis, CA.
170. James, R. N. III. (2019). Empirical analysis of charitable estate transfers: Past results, new findings, and the emerging potential of longitudinal research. American College of Trusts and Estates Counsel (ACTEC) Symposium: An Empirical Analysis of Wealth Transfer Law, October 11, 2019, UC-Davis School of Law, Davis, CA.
171. Liu, Z., & James, R. N. III. (2019). Time Will Tell: Determinants and Significance of Financial Planning Horizon Changes. American Council on Consumer Interests, May 21-23, 2019, Washington, D.C.
172. Liu, Z., & James, R. N. III. (2019). Finding the next major donor: The relationship between financial planning horizon and charitable giving. Academic Research Colloquium for Financial Planning and Related Disciplines, February 21, 2019, Washington, D.C.

    [poster] Hussein, R., & James, R. N. III. (2019). The importance of planning horizon on end-of-life financial and health planning. Academic Research Colloquium for Financial Planning and Related Disciplines, February 19-21, 2019, Washington, D.C.

    [poster] Liu, Z., & James, R. N. III. (2019). Time will tell: Determinants and significance of financial planning horizon changes [poster]. Academic Research Colloquium for Financial Planning and Related Disciplines, February 19-21, 2019, Washington, D.C.
173. Hussein, R., & James, R. N., III. (2018). The importance of planning horizon on end-of-life financial and health planning. Academy of Financial Services, October 2, 2018, Chicago, Illinois.
174. Lehman, J., & James, R. N., III. (2018). Charitable estate planning among donors to different types of charities. Academy of Financial Services, October 2, 2018, Chicago, Illinois.
175. Liu, Z., & James, R. N., III. (2018). Finding the next major donor: The relationship between financial planning horizon and charitable giving. Academy of Financial Services, October 2, 2018, Chicago, Illinois.

    [poster] Liu, Y., & James, R. N., III. (2018). The impact of mortality salience on asset decumulation decisions. Academy of Financial Services, October 2, 2018, Chicago, Illinois.

    [poster] Liu, Z., & James, R. N., III. (2018). Time will tell: Determinants and significance of financial planning horizon changes, Academy of Financial Services, October 2, 2018, Chicago, Illinois.
176. Liu, Z., & James, R. N., III. (2018). Cross-sectional and longitudinal factors affecting will and trust ownership. American Council on Consumer Interests, May 18, 2018, Clearwater Beach, Florida
177. Gerlach, J., Prather, L., & James, R. N., III (2018). The matriarchal transmission of environmental conservation support: Influence on charitable giving, bequest giving and organizational importance. American Society of Public Administration, March 12, 2018, Denver, Colorado.
178. Lehman, J., & James, R. N., III. (2018). Charitable estate planning among donors to different types of charities. Conference of the Southwestern Finance Association, March 8, 2018, Albuquerque, New Mexico.
179. Lehman, J., & James, R. N., III. (2018). Charitable, religious, and family estate planning attitudes among African-Americans. Certified Financial Planner® Board Academic Research Colloquium for Financial Planning and Related Disciplines, Feb. 22, 2018, Washington, D.C.
180. Liu, Z., & James, R. N., III. (2018). Behavioral and non-behavioral factors affecting will and trust ownership. CFP® Board Academic Research Colloquium for Financial Planning and Related Disciplines, Feb. 21, 2018, Washington, D.C.
181. Lehman, J., & James, R. N., III. (2017). Charitable bequest attitudes among minorities, and implications for financial planners. Association for Financial Counseling and Planning Education Research & Training Symposium, November 16, 2017, San Diego, CA.
182. Lehman, J. & James, R. N., III. (2017). Charitable, religious, and family estate planning attitudes among African Americans. Academy of Financial Services, October 2, 2017, Nashville, TN.

183. Liu, Z., & James, R. N. III. (2017). Behavioral and non-behavioral factors affecting will and trust ownership. Academy of Financial Services, October 1, 2017, Nashville, TN.
184. Lehman, J. & James, R. N., III. (2017). Consumer attitudes regarding charitable estate planning. American Council on Consumer Interests Annual Conference, April 23, Albuquerque, NM.
185. Lehman, J. & James, R. N., III. (2017). Contrasting attitudes regarding estate gifts towards religious and non-religious charities. Personal Financial Planning Research and Development Symposium, Feb. 23, Lubbock, TX
186. Williams, J. & James, R. N., III. (2017). Commercial annuity preferences and mortality salience: The role of symbolic immortality. Personal Financial Planning Research and Development Symposium, Feb. 23, Lubbock, TX
187. Liu, Z & James, R. N., III. (2017). Factors affecting will and trust ownership. Personal Financial Planning Research and Development Symposium, Feb. 23, Lubbock, TX

[poster] Cumming, B., Finke, M. S., James, R. N. III (2017) CFP Board Academic Research Colloquium, February 7-9, 2017, Arlington, VA.

188. James, R. N., III & O'Boyle, M. (2014). Bequest philanthropy as synthetic family: Evidence from fMRI and survey experiments. Science of Philanthropy Initiative Annual Conference, Nov. 7-8, Chicago, IL
189. Guillemette, M., Martin, T., Cummings, B. & James, R. (2014). Who demands longevity insurance? Academy of Financial Services Financial Planning Association BE Conference, Sept. 20-22, Seattle, WA.
190. Duffy, B., Hansen, R., James, R. N., III, Stienberg, R., & Tian, Y. (2014). Zombie philanthropy (a humorous presentation). Association for Research on Nonprofit and Voluntary Action's (ARNOVA) 43nd Annual Conference, November 19-22, Denver, CO.
191. James, R. N., III & Routley, C. (2013). Testing charitable bequest interventions. Association for Research on Nonprofit and Voluntary Action's (ARNOVA) 42nd Annual Conference, November 21-23, Hartford, CT. Abstracts available online at http://www.arnova.org/sections/paper.directory.php
192. Cummings, B. F., & James, R. N., III. (2013). The impact of financial advisors on the subsequent wealth of older adults. Academy of Financial Services 27th Annual Meeting, October 17-18, Chicago, IL.
193. James, R. N., III. (2013). This is your brain on financial satisfaction. Fourth Annual Financial Therapy Association Conference, September 29-October 1, Lubbock, TX.
194. James, R. N., III. (2013). The impact of CFP certification on consumer's cognitive processes during performance fluctuations: An fMRI neuroimaging study. American Council on Consumer Interests Annual Conference (p. 43), April 10-12, Portland, Oregon.
195. Huston, S. J. & James, R. N., III. (2013). An fMRI analysis of financial literacy assessment. American Council on Consumer Interests Annual Conference (p. 42), April 10-12, Portland, Oregon.
196. Cumming, B., Finke, M. & James, R. N., III. (2013). Bounded rationality strikes again: The impact of cognitive ability and financial planners on Roth IRA adoption and ownership. American Council on Consumer Interests Annual Conference (p. 37), April 10-12, Portland, Oregon.
197. James, R. N., III. (2012). The neuroeconomics of charitable giving, volunteering, and bequests. Southern Economic Association 82nd Annual Meeting, November 16-18, 2012, New Orleans, Louisiana.
198. James, R. N., III. (2012). Switching financial advisors: An fMRI study of its neural correlates. Academy of Financial Services Annual Conference, October 1-2, 2012, San Antonio, Texas. (proceedings at http://www.academyfinancial.org/12Conference/12Proceedings/G3%20James.pdf)
199. James, R. N., III., & O'Boyle, M. (2012). Charitable estate planning as visualized autobiography: An fMRI study of its neural correlates. Academy of Financial Services Annual Conference, October 1-2, 2012, San Antonio, Texas. (proceedings at http://www.academyfinancial.org/12Conference/12Proceedings/A4%20James%20OBoyle.pdf)
200. James, R. N., III., & O'Boyle, M. (2012). A brain imaging study of charitable and non-charitable estate planning decision-making: The visualized autobiography hypothesis. Third Annual Financial Therapy Association Conference, September 23-25, Columbia, Missouri.
201. Atiles, J. H., James, R. III., Douglas, H. (2013). Hispanics and housing during the economic downturn. BC2X572(pp. 28-34). Cambio Center, University of Missouri-Columbia: Proceedings of the 11th Annual Conference of Cambio de Colores. Latinos in the Heartland: At the crossroad: Incorporation or Marginalization? June 2012.
202. James, R. N., III, & O'Boyle, M. (2012). The neuroscience of charitable estate planning: An fMRI study of neural correlates. Consumer Interests Annual, 58, p. 48. [American Council on Consumer Interests Annual Conference, April 11-13, Memphis, Tennessee.]
203. Carswell, A., Delgadillo, L., Ziebarth, A., & James, R. N., III. (2011). International teaching and learning symposium. Proceedings of the 2011 Annual Conference of the Housing Education and Research Association (p. 58-61), October 12-15, 2011, Baton Rouge, Louisiana.
204. James, R. N., III, & Baker, C. (2010). The dichotomous effect of housing wealth on bequest giving and current giving in the U.S. and Australia. Association for Research on Nonprofit and Voluntary Action's (ARNOVA) 39th Annual Conference, November 18-20. Abstracts available online at http://www.arnova.org/sections/paper.directory.php

205. James, R. N., III, Robb, C. A., Weagley, R. O., Cude, B. J., Mauldin, T., & Palmer, L. (2010). Innovative teaching methods in undergraduate consumer economics and financial planning. Consumer Interests Annual, 56, p. 141-142 *[American Council on Consumer Interests Annual Conference, April 14-16, Atlanta, Georgia].*

206. James, R. N., III. (2009). Estimating philanthropic bequests for non-taxable estates in Giving USA. Association for Research on Nonprofit and Voluntary Action's (ARNOVA) 38th Annual Conference, (p. 41), November 19-21, Cleveland, Ohio. Abstracts available online at http://www.arnova.org/sections/paper.directory.php

207. James, R. N., III. (2009). Examining the relationship between cognitive ability and charitable giving. Association for Research on Nonprofit and Voluntary Action's (ARNOVA) 38th Annual Conference, (p. 46), November 19-21, Cleveland, Ohio. Abstracts available online at http://www.arnova.org/sections/paper.directory.php

208. James, R. N., III, Lauderdale, M., & Robb, C. (2009). The growth of charitable estate planning among Americans nearing retirement. Consumer Interests Annual, 55, p. 68 *[American Council on Consumer Interests Annual Conference, July 26-28, Milwaukee, Wisconsin].*

209. James, R. N., III. (2009). Apartment REITS, asymmetric information, and the consumer interest: Measuring dichotomous outcomes in tenant satisfaction. Consumer Interests Annual, 55, p. 29 *[American Council on Consumer Interests Annual Conference, July 26-28, Milwaukee, Wisconsin].*

210. James, R. N., III. (2009). The presence and timing of charitable estate planning: New research findings from AFP sponsored research. Association of Fundraising Professionals 46th International Conference on Fundraising [CD-ROM], March 29-April 1, New Orleans, Louisiana.

211. James, R. N., III. (2009). The theoretical and practical applications of charitable giving research. Association of Fundraising Professionals 46th International Conference on Fundraising [CD-ROM], March 29-April 1, New Orleans, Louisiana.

212. Rosen, M. J., James, R. N., III., Rooney, P. M., & Sargeant, A. (2009). Research unveiled: What every fundraiser needs to know about bequest giving. Association of Fundraising Professionals 46th International Conference on Fundraising [CD-ROM], March 29-April 1, New Orleans, Louisiana.

213. James, R. N., III & Atiles, J. H. (2009). Homeownership plans among Hispanic renters: Ethnic differences or geographic differences? Proceedings of the 43rd Annual Conference of the Housing Education and Research Association (p. 83-86), November 1-4, 2009, Santa Fe, New Mexico.

214. James, R. N., III & Sweaney, A. L. (2009). Connecting residential dissatisfaction and cognitive decline in older adults: A longitudinal analysis. Proceedings of the 43rd Annual Conference of the Housing Education and Research Association (p. 204-208), November 1-4, 2009, Santa Fe, New Mexico.

215. James, R. N., III. (2009). The rise of apartment real estate investment trusts (REITS): A first analysis of impacts on residential satisfaction. Proceedings of the 40th Annual Meeting of the Environmental Design Research Association (p.354-355), May 27-May 31, Kansas City, Missouri.

216. James, R. N., III. (2009). The origin of spaces: Apes, humans, and a hierarchy of natural housing functions. Proceedings of the 40th Annual Meeting of the Environmental Design Research Association (p. 354), May 27-May 31, Kansas City, Missouri.

217. James, R. N., III (2009). REITs, REIT legislation, and residential satisfaction in multifamily Housing. Working Group session Housing and Policy: National and International Perspectives, Proceedings of the 40th Annual Conference of the Environmental Design Research Association (p. 348). May 27-31, 2009, Kansas City, Missouri.

218. James, R. N., III. (2008). The valuation of revocable charitable estate gifts. Proceedings from the Association for Research on Nonprofit and Voluntary Action's (ARNOVA) 37th Annual Conference: Leading in Building Civil Society (p. 44), November 19-22, Philadelphia, Pennsylvania.

219. James, R. N., III. (2008). Residential satisfaction of elderly residents in rented apartment homes. Proceedings of the Housing Education and Research Association 42nd Annual Conference: Housing at the Crossroads (pp. 52-55), October 7-10, Indianapolis, Indiana.

220. James, R. N., III. (2008). Renter time preference as a barrier to homeownership. Proceedings of the Housing Education and Research Association 42nd Annual Conference: Housing at the Crossroads (pp. 56-60), October 7-10, Indianapolis, Indiana.

221. James, R. N., III. (2008). The suburbanization of government-supported rental housing and decline in neighborhood and residential satisfaction. A Suburban World: Global Decentralization and the New Metropolis International Conference: Conference Abstracts (pp. 57-58), April 6-8, Reston, Virginia.

222. James, R. N., III., Carswell, A. T., & Robb, C. (2008). Estimating the outlays of renting and owning: The risks of hidden ownership costs. Proceedings of the Eastern Family Economics Research Association (pp. 36-38), February 29-March 1, Savannah, Georgia.

223. Robb, C., & James, R. N. III. (2008). Personal financial knowledge among college students: Associations between individual characteristics and scores on an experimental measure of financial knowledge. Consumer Interests Annual, 54, p. 144 *[American Council on Consumer Interests Annual Conference, July 27-29, Orlando, Florida].*

224. James, R. N., III & Jones, K.S. (2007). Tithing: An examination of religious charitable giving in America. Proceedings of the Association for Research of Nonprofit Organizations and Voluntary Action

(ARNOVA) 35th Annual Conference, November 15-17, 2007, Atlanta, GA. Available at http://www.arnova.org/conference/handouts/CKrSfN_07/Tithing_Paper.pdf

225. James, R. N., III. (2007). Barriers to affordable housing: A "big picture" overview [PowerPoint]. Housing opportunities for all Georgians: A call to action [CD-ROM]. September 25, Athens, GA [*Invited presentation*]
226. James, R. N., III., & Sharpe, D. L. (2007). Retirement savings and expenditure patterns of renters and homeowners: Different resources or different views? Consumer Interests Annual, 53, 169. *[American Council on Consumer Interests Annual Conference, April 18-21, St. Louis, MO]*
227. James, R. N., III., Carswell, A. T., & Sweaney, A. L. (2007). Sources of discontent: residential satisfaction of tenants from an internet ratings site. Proceedings of the 2007 Annual Conference of the Housing Education and Research Association (pp. 81-95), October 23-26, Charlotte, North Carolina.
228. James, R. N., III, Carswell, A. T., & Phillips, D. R. (2007). Tenant and homeowner expenditures: uncovering the true costs of homeownership. Proceedings of the 2007 Annual Conference of the Housing Education and Research Association (pp. 72-80), October 23-26, Charlotte, North Carolina.
229. James, R. N., III, & Atiles, J. (2007). Hispanic renters and the transition to homeownership in the survey of consumer finances. Proceedings of the 2007 Annual Conference of the Housing Education and Research Association (pp. 68-71), October 23-26, Charlotte, North Carolina.
230. Robinson, K. E., Carswell, A. T., & James, R. N., III (2007). The residential satisfaction of military households in privatized apartment communities. Proceedings of the 2007 Annual Conference of the Housing Education and Research Association (pp. 177-183), October 23-26, Charlotte, North Carolina.
231. Nielsen, R. B., James, R. N., III, & Garasky, S. B. (2007). Do housing expenditures crowd-out medical out-of-pocket expenditures? Proceedings of the 2007 Annual Conference of the Housing Education and Research Association (pp. 154-160), October 23-26, Charlotte, North Carolina.
232. James, R. N., III. (2007). Can residential satisfaction be increased for everyone? How rent subsidization and public housing affects individual, regional, national, and international satisfaction levels (poster session). Proceedings of the 2007 Annual Conference of the Housing Education and Research Association (pp. 222-230), October 23-26, Charlotte, North Carolina.
233. James, R. N., III. (2006). Multi-family housing, social capital, and charitable behavior: Are apartment residents more "connected"? Proceedings of the Association for Research of Nonprofit Organizations and Voluntary Action (ARNOVA) 35th Annual Conference (p. PA061149), November 16-18, Chicago, Illinois.
234. James, R. N., III., & Sharpe, D. L. (2006). Asset rich or asset poor: Retirement saving patterns of older tenants (poster session). Proceedings of the Association for Financial Counseling and Planning Education Annual 2006 Annual Conference (p. 112), November 15-17, San Antonio, Texas.
235. Carswell, A. T., & James, R. N., III. (2006). Virtual property manager: Providing a simulated learning environment in a new university program of study. 4th International Conference on Education and Information Systems, Technologies and Applications, July 20-23, Orlando, Florida.
236. James, R. N., III., & Sharpe, D. L. (2002). Pass the collection plate: An economic analysis of religious charitable giving. Proceedings of the Association of Financial Counseling and Planning Education Annual Conference (pp. 71-80), November 20-23, Scottsdale, Arizona.

Other academic conferences attended

Association for Research on Nonprofit Organizations and Voluntary Action Annual Conference, November 15-17, 2012, Indianapolis, IN
Academy of Financial Services Annual Meeting, October 9-10, 2010, Denver, CO
Financial Planning Association Annual Conference, October 9-12, 2010, Denver, CO
The Voluntary Action History Society, July 14-16, 2010, Canterbury, United Kingdom
The American Economics Association / Allied Social Science Associations Annual Meeting, January 4-6, 2008, New Orleans, LA; January 3-6, 2009, Atlanta, GA; January 2-5, 2014, Philadelphia, PA
Association of Fundraising Professionals Research Council: March 29, 2008, San Diego, CA; October 18, 2008, Nashville, TN; March 28, 2009, New Orleans, LA; April 10, 2010, Baltimore, MD;
The American Council on Consumer Interests Annual Conference, March 15-18, 2006, Baltimore, Maryland
The Society for Neuroeconomics Annual Conference, Sept. 15-18, 2005, Kiawah Island, South Carolina

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Invited Presentations

International Universities

1. University of the Free State – Financial Planning Institute. *Neuroimaging and financial advisor selection.* April 26, 2016. Bloemfontein, South Africa.
2. Erasmus University – Department of Sociology & Erasmus Centre for Strategic Philanthropy. *The neuroscience of charitable bequests, giving, and volunteering: An fMRI study*. April 2, 2012. Rotterdam, The Netherlands.
3. City University London – Cass Business School Centre for Charitable Giving and Philanthropy. *Bequest Donors: New findings, frameworks, and implications.* July 21, 2010. City of London, London, England, UK.
4. Heriot-Watt University – School of the Built Environment. *The US mortgage crisis: An overview of economic and policy causes, and a discussion of future approaches.* June 22, 2009. Edinburgh, Scotland, UK.

5. Zittau/Görlitz University of Applied Sciences – Department of Housing and Real Estate Management. *Housing finance and the financial crisis in the U.S.* June 18, 2009. Zittau, Germany.
6. Trinity College Dublin – The Centre for Nonprofit Management. *The interrelationship of philanthropy, volunteering, and cognition in older adults: A cross-sectional and longitudinal analysis*. March 13, 2009, Dublin, Ireland.
7. VU University Amsterdam (Vrije Universiteit) – Department of Philanthropic Studies. *Annual philanthropic studies lunch seminar: Connecting volunteering and philanthropy with cognition and memory in older adults*. March 12, 2009, Amsterdam, The Netherlands.
8. Universitat Rovira i Virgili – Department of Private, Procedural, and Financial Law. *Housing finance and the mortgage crisis in the United States.* March 11, 2009, Tarragona, Spain.
9. Universitat Rovira i Virgili – Department of Private, Procedural, and Financial Law. *Introduction to the US legal system.* March 11, 2009, Tarragona, Spain.
10. Universitat Rovira i Virgili – Department of Private, Procedural, and Financial Law. *Consumer protection and tort law in the United States.* March 10, 2009, Tarragona, Spain.
11. Universitat Rovira i Virgili – Department of Private, Procedural, and Financial Law. *REITs in the United States.* March 10, 2009, Tarragona, Spain.

U.S. Universities

12. Truman State University (Institutional Advancement). *(1st) Inside the mind of the planned giving donor: What neuroimaging and experimental research reveal about donor motivations; (2nd) How to ask for an estate gift without fear or anxiety: The science and the sentences.* November 3, 2021. Webinar.
13. Utah State University. *Introduction to the professoriate* (guest lecture for Professor Sean E. Michael). October 11, 2021. Webinar.
14. University of Hartford (Institutional Advancement). *Socratic fundraising theory and practice: Using questions to advance the donor's story.* September 15, 2021. Webinar.
15. University of Central Florida (Institutional Advancement). *Gifts of wealth and the psychology of the massive donation.* February 11, 2021. Webinar.
16. University of Texas (Institutional Advancement). *Charitable planning with life insurance and top 3 take-aways*. February 5, 2021. Webinar.
17. Carnegie Mellon University (Institutional Advancement). *Words that work in major and planned gifts fundraising*. January 21, 2021. Webinar.
18. University of Texas (Institutional Advancement). *The effective fundraiser – training series*. August 12, 19, 26, September 2, 9, 16, 23, 30, 2020. Webinar.
19. Texas Tech University. (Institutional Advancement). *The epic fundraiser – training series*. April 9, 16, 23, 30, May 7, 14, 21, 28, June 4, 11, 18, 25, July 9, 16, 23, August 6, 2020. Webinar.
20. The American College of Financial Services, *The hidden code of end-of-life financial decisions.* July 12, 2020. Webinar.
21. Texas Tech School of Law. (Board Meeting). *The impact of noncash assets on long-term fundraising success.* March 7, 2020, Lubbock, TX.
22. Utah State University. *Introduction to the professoriate* (guest lecture for Professor Sean E. Michael). October 16, 2019. Webinar.
23. The University of California – Davis (Institutional Advancement). (1st) *Baby Boomers and planned giving*; (2nd) *The Hidden code of end-of-life decisions*. October 10, 2019. Davis, CA.
24. The Ohio State University (Institutional Advancement). *How noncash gifts predict current and future fundraising growth in colleges and universities*; (2nd) *Words that work in major and planned gifts*. November 5, 2018, Columbus, OH
25. The University of Central Florida (Institutional Advancement). *Research findings on the power of noncash gifts in college and university fundraising; (2nd) A statistical analysis of words and phrases in major and planned giving.* September 17, 2018. Orlando, FL.
26. The University of Colorado (Institutional Advancement). *Why cash is not king in fundraising: Results from 1 million nonprofit tax returns*; (2nd) *Experimental results on variations in words and phrases used in major and planned giving communications*. August 21, 2018. Denver, CO.
27. The University of Oregon (Institutional Advancement). *Natural philanthropy: How the natural origins of donor motivations drive powerful fundraising*; (2nd) *Words that work in major and planned gifts*, June 19, 2018, Eugene, OR
28. Oregon State University (Institutional Advancement). *Why cash is not king in fundraising: Results from 1 million nonprofit tax returns*, June 18, 2018, Corvallis, OR
29. St. John Fisher College (sponsored by Planned Giving Council of Upstate New York). *Inside the mind of the planned giving donor: What neuroimaging and experimental research reveal about donor motivations*, June 7, 2018, Rochester, NY

30. Texas Tech University System (Institutional Advancement). *Words that work in major and planned gifts fundraising*, May 11, 2018, Lubbock, TX
31. Duke University - Center for Advanced Hindsight (Behavioral Economics). *New results on the statistics and psychology of noncash gifts as a predictor of fundraising success.* March 22, 2018, Durham, NC
32. Pepperdine University. *Experimental tests on words and phrases in planned and major gifts,* January 28, 2016, Malibu, CA
33. Indiana University - 28th Annual Philanthropy and Fundraising Symposium. *Insights into Motivations for Giving,* (with Sara Konrath), October 30th, 2015, Indianapolis, IN
34. University of California – Irvine. The Financial Planning Association of Orange County Quarterly Educational Meeting. *Using the right words with charitable planning clients (+ top law & tax strategies)*, August 12, 2015, Irvine, CA
35. Amherst College. Planned Giving Officers 21st Annual Summer Conference. *Mythbusters: Gift planning edition,* July 15, 2015, Amherst, MA
36. Hope College. Professional Advisory Committee. *Best law & tax techniques for charitable planning.* Western Michigan Planned Giving Group Quarterly Meeting. *Phrases to encourage gift planning; (2nd) Statistics and demographics in legacy fundraising,* June 17, 2015, Holland, MI
37. Marquette University. *(1st) Neuroimaging and bequest decision making; (2nd) An introduction to the law & taxation of planned giving,* June 16, 2015, Marquette, WI
38. Union College. Nebraska Partnership for Philanthropic Planning. *What neuroimaging and experimental research reveal about donor motivations*, June 4, 2015, Lincoln, NE
39. New York University. Philanthropic Planning Group of Greater New York. Planned Giving Day New York City. *Co-presented with Claudine Donikian, Statistical analysis of the words & phrases that encourage planned giving*, May 28, 2015 NYU – Kimmel Center, New York City, NY
40. Belmont University. Planned Giving Council of Middle Tennessee Meeting. *(1st) The new statistics of charitable bequest planning; (2nd) Survey results from planned giving description experiments.* May 19, 2015, Nashville, TN
41. Ozark Christian College. *(1st) A longitudinal analysis of charitable estate planning additions, deletions, and ultimate transfers*. (2nd) *Phrases that encourage planned giving: A review of survey results,* December 15, 2014, Joplin, Missouri
42. Fort Hayes State University. Western Kansas Estate Planning Council. (1st) *Top charitable planning strategies for financial advisors,* (2nd) *The demographics and statistics of charitable estate planning*, November 12, 2014, Hayes, KS
43. Pepperdine University. 21st Annual Conference of Christian University Planned Giving Officers. *Words That Work: Key messages and phrases that encourage planned giving from 10,000 test subjects.* October 13, 2014, Malibu, CA
44. University of Texas-Dallas. Graduate course in nonprofit management, guest lecture. (1st) *The demographics and statistics of charitable estate planning*, (2nd) *Inside the mind of the bequest donor: Neuroimaging and bequest decision making*, October 9, 2014
45. Samford University. *A Neuroimaging Study of Investor Response to the Certified Financial Planner® Designation During Market Fluctuations.* September 18, 2014, Birmingham, AL
46. Samford University. *Neuroeconomics and charitable giving: Connecting research with practice*. September 17, 2014, Birmingham, AL
47. Virginia Tech. College of Architecture and Urban Studies 50th Anniversary Symposium. *Non-traditional approaches in housing research: from nesting apes to neuroimaging.* September 7, 2014, Blacksburg, VA
48. California State University Sacramento. Planned Giving Forum of Greater Sacramento. (1st) *Inside the mind of the bequest donor - What neuroimaging tells us about donor decision-making* (2nd) *The new demographics of charitable bequests: A 20-year longitudinal study of plan additions, deletions, and ultimate charitable transfers*. June 3, 2014, Sacramento, CA
49. New York University. Philanthropic Planning Group of Greater New York. Planned Giving Day New York City. *What neuroimaging tells us about donor decision-making.* May 21, 2014, New York City, NY
50. Lindenwood University. St. Louis Planned Giving Council. *Mama Mia! Inside the mind of the bequest donor.* May 20, 2014, St. Charles, MO.
51. University of Cincinnati. Neuroimaging and charitable bequest decision-making. May 15, 2014, Cincinnati, OH.
52. University of Central Florida. (Nonprofit Management Graduate Program). *Philanthropy as synthetic family – Results from neuroimaging*. March 18, 2014, Orlando, FL
53. Anderson University. *A review of American charitable bequest demographics.* November 11, 2013, Anderson, IN
54. Kansas State University – Ph.D. program lecture. *Establishing a strong and unique research program.* October, 25, 2013 (online)
55. University of Indiana – Seminar Series at the Center for Philanthropy. *The myth of the coming charitable estate windfall*. October 7, 2008, Indianapolis, IN (interactive simulcast at Milwaukee, WI).

56. University of Michigan Institute for Social Research –Health and Retirement Study Workshop. *Research on charitable estate planning using the HRS.* June, 2008, Ann Arbor, MI
57. Georgia State University – Nonprofit Studies Program Brown Bag Seminar in Nonprofit Research. *Health, wealth, and charitable estate planning: A longitudinal examination of testamentary charitable giving plans.* April 15, 2008, Atlanta, GA.
58. Ozark Christian College – *Student housing and the economics of institutional growth*. July 27, 2007, Joplin, MO.
59. University of Georgia – Department of Housing & Consumer Economics Seminar. *Using the Health and Retirement Study in research.* February 18, 2009, Athens, GA.
60. University of Georgia – Department of Housing & Consumer Economics Seminar. *The transitioning nature of Hispanic renters: Changes and barriers in homeownership-related activity*. April 16, 2007, Athens, GA.
61. University of Georgia – Latino Research Forum. *Hispanic renters* (with Jorge Atiles). April 2, 2007, Athens, GA.
62. University of Georgia – Honors College Student Luncheon. *If it makes you happy: What the social statistics can tell us about life satisfaction*. March 21, 2007, Athens, GA

Professional Venues

63. The Fundraising Talent Podcast #59. *Are administrators out to ensure that they are the hero in the story?* January 29, 2022. Podcast. https://responsivefundraising.com/content/socratic-fundraising-james
64. The Good Life and Legacy Podcast. *Encourage generosity.* January 25, 2022. Podcast. https://www.youtube.com/watch?v=sZrDDve51YY
65. Chatbytes Prospect Research Podcast. *The psychology of giving from wealth.* January 21, 2022. Podcast.
66. Alabama Association of Charitable Gift Planners. *Socratic fundraising: Questions and the donor's journey.* January 20, 2022. Webinar.
67. Rethinking65 for Financial Planners. *Now is the time to discuss charitable trusts, IRA planning with clients*. January 19, 2022. Webinar.
68. The Donor Participation Project. *Why people give: Fundraising recommendations from behavioral science*. January 19, 2022. Webinar.
69. The Responsive Weekly Podcast. *Fundraising myth and science.* Podcast. January 13, 2022.
70. MarketSmart. *How to use questions to advance the donor's journey.* December 8 & 9, 2021. Webinar.
71. Baltimore Estate Planning Council. *Statistical analysis of Baby Boomers and planned giving: A very special generation or just typical old people?* December 2, 2021. Webinar.
72. Professional Advisors Conference/CLE: Catholic Foundation of Oklahoma. (*1st*) *Special charitable financial and estate planning; (2nd) The hidden code of end-of-life decisions. What estate and financial planners can learn from decision-making research in life insurance, annuities, estate planning, and health care.* December 1, 2021. Oklahoma City, OK.
73. Western Virginia Charitable Gift Planners. *Special charitable financial planning opportunities for November 2021.* November 19, 2021. Webinar.
74. The Build Good Fundraising Podcast. *How to advance your donor's hero story with Dr. Russell James*. November 16, 2021. Podcast.
75. The Donor Motivation Planned Giving Summit (Canada). *Inside the mind of a planned giving donor*. November 12, 2021. Webinar.
76. Celebrating Philanthropy Conference – Lubbock Association of Fundraising Professionals. *(1st) Raising major gifts of assets in the aftermath of COVID-19 by Russell James; (2nd) Words that work in major and planned gifts fundraising.* November 11, 2021. Lubbock, TX.
77. North Carolina Council of Gift Planners. *Socratic fundraising: Using questions to advance the donor's journey*. November 10, 2021. Webinar.
78. Emerging Philanthropy Conference – Pittsburgh Planned Giving Council and the Association of Fundraising Professionals Western Pennsylvania Chapter. *Why cash is not king in fundraising: Results from one million nonprofit tax returns.* November 10, 2021. Webinar.
79. Performing Arts Centers Council - Chief Development Officers Meeting. *Top 10 legacy fundraising strategies from scientific research: National data & results from the lab.* November 9, 2021. Webinar.
80. Next in Nonprofits Podcast. *Fundraising myth and science with Russell James.* November 2, 2021. Podcast. https://www.nextinnonprofits.com/2021/11/fundraising-myth-and-science-with-russell-james/
81. Planned Giving Forum of Greater Sacramento. *What neuroimaging and experimental research reveal about donor motivations.* October 28, 2021. Webinar.
82. Association Foundation Group Conference. *Important year-end charitable giving strategies*. October 27, 2021. Webinar.
83. DonorSearch Philanthropy Masterminds Series. *Introducing Socratic fundraising: Using questions to advance the donor's story.* October 26, 2021. Webinar.
84. The Carter Center (Atlanta). *Behavioral economics and philanthropy*. October 25, 2021. Webinar.

85. Sound Sound Association of Fundraising Professionals. *Raising major gifts of assets: New strategies for a new world.* October 22, 2021. Webinar.
86. PG Calc. *Important year-end charitable giving strategies*. October 21, 2021. Webinar.
87. The Nonprofit Lowdown Podcast (Rhea Wong). *The science of fundraising with Greg Warner and Dr. Russell James*. October 21, 2021. Podcast.
88. MarketSmart. *The fundraising myth & science series with Dr. James (Beta).* October 20, 2021. Webinar.
89. The Carter Center (Atlanta). *Behavioral economics, philanthropy and finance*. October 20, 2021. Webinar.
90. Mid-Iowa Planned Giving Council Fall Conference. *(1st) Top 10 legacy fundraising strategies from scientific research: National data & results from the lab; (2nd) Why cash is not king in fundraising: Results from 1 million nonprofit tax returns.* October 19, 2021. Webinar.
91. Conversations with Industry Icons. *Selling philanthropy to CFOs.* October 19, 2021. Podcast. https://ceplan.com/podcasts/selling-philanthropy-to-leadership
92. Central New York Community Foundation. *Special charitable planning opportunities for 2021 & research to motivate your clients.* October 14, 2021. Webinar.
93. Carter Global. *The psychology of the massive donation: Foundations, funds, trusts, and endowments.* October 13, 2021. Webinar.
94. The Minerals, Metals & Materials Society Foundation. *Smarter ways to give: Top 10 tax tips for 2021.* October 13, 2021. Webinar.
95. Seventh-day Adventists Planned Giving & Trust Services Conference. *Baby boomers and planned giving & new results from 100 years of national data on charitable bequests*. October 7, 2021. Webinar.
96. Fundraising Voices Podcast (Ruffalo Noel Levitz). *The myths and science of fundraising*. October 6, 2021. Podcast. https://www.fundraisingvoices.com/
97. Voice from the Hills Podcast – Silicon Hills Wealth Management. *Charitable giving.* October 6, 2021. Podcast. https://www.audible.com/pd/Podcast/B08JJMT38F
98. Charitable Gift Planners National Conference (In Person). *Charitable financial planning strategies for 2021: New strategies for a new world (plenary session).* October 6, 2021. Orlando, FL.
99. Charitable Gift Planners of Central Ohio & Central Ohio Association of Fundraising Professionals Half-Day Conference. (1st) *The hidden code of end-of-life decisions: What legacy fundraising can learn from decision-making in life insurance, annuities, estate planning, and healthcare*; (2nd) *Raising major gifts of assets in the aftermath of COVID-19: New strategies for a new world.* October 6, 2021. Webinar.
100. Charitable Gift Planners National Conference (In Person). *Panel discussion on nonprofit consulting.* October 5, 2021. Orlando, FL.
101. Charitable Gift Planners National Conference (In Person). *Panel discussion on the future of planned giving with Hall of Fame inductees.* October 4, 2021. Orlando, FL.
102. Charitable Gift Planners National Conference (Virtual). *How to ask for estate gifts without fear or anxiety.* September 21, 2021. Webinar.
103. Northern Illinois Planned Giving Council. *Raising major gifts of assets in the aftermath of Covid 19 – New strategies for a new world.* September 17, 2021. Webinar.
104. Australian Institute of Fundraising – Include a Charity Conference. *Making the legacy fundraising request.* September 14, 2021. Webinar.
105. Pentera nonprofit advising. *New results from 380 years of national data on charitable bequests.* September 14, 2021. Webinar.
106. International Catholic Stewardship Conference Forum on Catholic Foundations. (1st) *Raising major gifts of assets in the aftermath of COVID 19: New strategies for a new world*; (2nd) *New results from 100 years of national data on charitable bequests*. September 11, 2021. Webinar.
107. San Antonio Association of Fundraising Professionals. *Storytelling in major and planned gifts fundraising.* September 10, 2021. Webinar.
108. Wells Fargo "Critical Conversations." *Cash is not king – Research results on the power of noncash gifts for long-term fundraising success.* September 10, 2021. Webinar.
109. Hampton Roads Gift Planning Council. *The top 10 legacy fundraising strategies from scientific research: National data and results from the lab*. September 9, 2021. Webinar.
110. Barnabas Foundation. *Socratic fundraising: Using questions to advance the donor's story.* September 9, 2021. Webinar.
111. Northeast Florida Planned Giving Council. *The hidden code of end-of-life decisions.* September 9, 2021. Webinar.
112. The Rainmaker Fundraising Podcast. *The storytelling nonprofit.* Podcast.
113. Christian Aid (UK Nonprofit Collective) Lunch & Learn. *How to ask for a gift in a will.* Webinar.
114. Planned Giving Council of Middle Tennessee. *Raising major gifts of assets in the aftermath of COVID-19: New strategies for a new world*. September 1. Webinar.

115. Association of Philanthropic Counsel. *Gifts of wealth and the psychology of the transformational donation.* August 27, 2021. Webinar.
116. Northeast Wisconsin Association of Fundraising Professionals. *Inside the mind of the planned giving donor: Results from neuroimaging and the lab.* August 26, 2021. Webinar.
117. Lighthouse Counsel Podcast. *Using stories to increase planned giving*. August 19, 2021. Podcast. https://www.lighthousecounsel.com/podcasts/using-stories-to-increase-planned-giving/
118. Remember a Charity UK - Members Forum. *How to ask for a legacy gift: The science and the sentences.* June 22, 2021. Webinar.
119. Association of Fundraising Professionals Las Vegas. *New Results from 100 years of national data on charitable bequest gifts*. June 17, 2021. Webinar.
120. United Way of Greater Houston and the Center for Philanthropy and Nonprofit Leadership at Rice University. *Predicting long-term fundraising growth from IRS Form 990: Why cash is not king.* June 11, 2021. Webinar.
121. Planned Giving Council of Eastern Wisconsin. *How to ask for the gift in a will without fear or anxiety.* June 10, 2021. Webinar
122. Dallas Fort Worth Association of Fundraising Professionals Annual Conference. *Using storytelling in major and planned gifts fundraising.* June 4, 2021. Webinar.
123. Dallas Fort Worth Association of Fundraising Professionals Annual Conference. *Socratic fundraising: Using questions to advance the donor's story.* June 3, 2021. Webinar.
124. Create a Jewish Legacy Leadership Gathering / Life & Legacy Annual Conference. *Baby Boomers and planned giving.* May 25, 2021. Webinar.
125. Chicago Council on Planned Giving. *Using storytelling in major and planned gifts fundraising.* May 27, 2021. Webinar.
126. Focus on the Family. *New charitable tax provisions: Using the 100% AGI Limit.* May 21, 2021. Podcast.
127. University of Texas – Austin, Gift Planning Advisory Council. *The data and psychology behind charitable estate planning.* Webinar. May 20, 2021.
128. Endowment Partners, Las Vegas, NV. *Putting research to work in your planned giving program.* May 19, 2021. Webinar.
129. Thompson & Associates (nonprofit advisors). *Selling planned giving to the CFO*. May 19, 2021. Webinar.
130. Estate Planning Council of Naples, Florida. *Top 10 charitable planning strategies for financial advisors under the current tax law and the SECURE Act. (2nd) The hidden code of end-of-life decisions: What estate planners can learn from decision-making in life insurance, annuities, estate planning, and healthcare*. May 18, 2021.
131. Non-profit Artificial Intelligence Forum (Hosted by Acadia University). *Data, statistics and surprises impacting charitable giving bequests.* May 18, 2021.
132. Community Foundation of Memphis & Planned Giving Council of the Mid-South. *Why cash is not king in fundraising – Results from one million tax returns.* May 13, 2021. Webinar.
133. Woodmark Summit for Children's Hospitals. *Using storytelling in major and planned gifts fundraising: New findings, ancient origins, and practical tips.* May 5, 2021. Webinar.
134. Woodmark Summit for Children's Hospitals. *Top 10 gift-planning fundraising strategies.* May 6, 2021. Webinar.
135. Kansas City Estate Planning Symposium Annual Conference. *Insights on the decision-making processes used by Americans who include charitable giving as part of their estate plans*. April 22, 2021. Webinar.
136. The Future of Fundraising Conference. The epic fundraiser: Myth and science in philanthropic storytelling. April 16, 2021. Webinar.
137. Inland Empire Community Foundation – Professional Advisors Council. *Top 10 charitable planning strategies for advisors: Helping your business and your clients with charitable planning*. March 25, 2021. Webinar.
138. The West Virginia Association of Charitable Gift Planners. *Raising major gifts of assets: New strategies for a new world.* March 12, 2021. Webinar.
139. The Nature Conservancy. *Non-cash assets: What are they? How to talk to donors about them, and why it matters.* March 9, 2021. Webinar.
140. Barnabas Foundation. *The fundraising game-changer: Non-cash assets.* March 3, 2021. Webinar.
141. Fulfilled Fundraisers Podcast. *Making bequests and major gifts fundraising your highest priority.* March 1, 2021. Podcast. https://fulfilledfundraisers.com/fundraising-interviews/prioritising-bequests-and-major-gifts-fundraising/
142. Association of Philanthropic Counsel. *Cash is not king in fundraising: Results from 1 million nonprofit tax returns*. February 19, 2021. Webinar.
143. Sant Antonio Estate Planning Council. *Special charitable financial and estate planning opportunities.* February 16, 2021. Webinar.
144. 2021 Diocesan Directors Forum. (1st) *100 years of legacy data;* (2nd) *Inside the mind of the legacy donor;* (3rd) *Using donor surveys in planned gift marketing*; (4th) *Counting revocable estate gifts.* February 8, 2021. Oklahoma City, OK.
145. The Real Agents of Change. *Real estate and charitable gifting.* February 3, 2021. Webinar.

146. The Stelter Group (sponsor). *Raising major gifts of assets during a pandemic.* February 2, 2021. (Two presentations noon & 2pm due to high registration). Webinar.
147. The International Council of Fine Arts Deans. *How to easily ask for a gift in a will without anxiety or fear: The magic phrases.* January 26, 2021. Webinar.
148. Hampton Roads Estate Planning Council. *Top 10 charitable planning strategies for financial advisors*. January 19, 2021. Webinar.
149. Create a Jewish Legacy Leadership Gathering / Life & Legacy Annual Conference. *The Top 10 legacy fundraising strategies from scientific research.* January 14, 2021. Webinar.
150. Planned Giving Council of Palm Beach County. *Charitable planning strategies in a pandemic.* January 12, 2021. Webinar.
151. Fundmetric The Opt-In Podcast. *Using data in legacy fundraising.* December 16, 2020. Podcast. https://www.fundmetric.com/podcast
152. Ft. Worth Association of Fundraising Professionals. *The epic fundraiser: Myth and science in philanthropic storytelling.* December 14, 2020. Webinar.
153. National Free Wills Network Conference – UK. *Top 10 legacy fundraising strategies from scientific research: National data & results from the lab.* December 7, 2020.
154. Impact Foundation, Fargo, North Dakota. *End of year donor communications*. December 3, 2020.
155. The Joe Robert Show. *How charitable lead trusts can direct your wealth to your beneficiaries.* December 1, 2020. Podcast. https://joerobert.libsyn.com/2020/12
156. Planned Giving Round Table of Arizona. *Major Gifts in the Aftermath of COVID-19.* November 30, 2020. Webinar.
157. North Carolina Council of Charitable Gift Planners Annual Conference. *Major gifts of assets in a COVID world.* November 19, 2020. Webinar.
158. Valley Community Foundation - Connecticut. *Special charitable financial planning opportunities for November 2020*, November 17, 2020. Webinar.
159. Charitable Chit Chat with Cathy & Claire. *Key principles and latest research results in planned giving.* November 13, 2020. Webinar.
160. Association of Fundraising Professionals - Aloha Chapter National Philanthropy Day. *Raising major gifts of assets in the aftermath of COVID-19: New strategies for a new world.* November 12, 2020. Webinar.
161. Legacy Strategy Summit 2020. *Capitalising on your network for your legacy campaign* (Joint presentation with with Lynn Malzone Ierardi - University of Pennsylvania, Carolyn Jones - University of Liverpool, Viet Anh Hua - The London School of Economics and Political Science, and Dee Brecker - The London School of Economics and Political Science). November 11, 2020. Webinar.
162. Canadian Association of Gift Planners - Montreal. *Words that work in major and planned gifts fundraising: Statistical analysis of the words and phrases that encourage planned giving*. November 11, 2020. Webinar.
163. Financial Therapy Association. *The hidden code of end-of-life financial planning decisions.* November 6, 2020. Webinar.
164. Minnesota Gift Planning Association Annual Conference – Philanthropy in Practice. *Top 10 legacy fundraising principles from scientific research: Theory, statistics, and results from the lab.* October 28, 2020. Webinar.
165. Compassion International. *Donor research discussion with Dr. Russell James.* October 27, 2020.
166. Amarillo Area Foundation. *Top 10 charitable planning strategies 2020.* October 22, 2020.
167. Chabad Tomorrow – Creating a Jewish Future. *Using storytelling in planned giving fundraising*. October 21, 2020. Webinar.
168. Thompson & Associates. *Selling philanthropy to leadership.* October 19, 2020. Podcast. https://ceplan.com/podcasts/selling-philanthropy-to-leadership
169. South Plains Trust and Estate Council. *The hidden code of end-of-life decisions: Implications for estate planning.* October 15, 2020. Lubbock, TX.
170. Planned Giving Group of Connecticut. *Special financial planning opportunities with a focus on charitable planning.* October 14, 2020. Webinar.
171. National Association of Charitable Gift Planners Annual Conference. *Question and Answer session with plenary speaker.* October 9, 2020. Webinar.
172. National Association of Charitable Gift Planners Annual Conference. *Putting research to work in your gift planning program.* October 8, 2020. Webinar.
173. Emerging Philanthropy Conference hosted by Pittsburgh Planned Giving Council and Association of Fundraising Professionals of Western Pennsylvania. *Raising major gifts of assets in the aftermath of Covid-19: New strategies for a new world.* October 6, 2020. Webinar.
174. NPlace.org (Nonprofit Place). *Words that work to raise major and planned gifts.* October 6, 2020. Webinar.
175. Planned Giving Group of New England. *Latest research findings on major gifts of assets and legacy gifts.* October 1, 2020. Webinar.

176. Central Georgia Estate Planning Council. *Charitable financial planning opportunities for the remainder of 2020.* September 24, 2020. Webinar.
177. Pentera nonprofit advising. *Raising major gifts of assets in the aftermath of Covid-19: New strategies for a new world.* September 23, 2020. Webinar.
178. Mid-America Charitable Gift Planners Association and UMKC School of Law Continuing Legal Education. (1st) Charitable Gifting of Assets in the Aftermath of Covid-19. (2nd) Words that Work in Major and Planned Gifts Fundraising: Statistical Analysis of the Words and Phrases that Encourage Planned Giving. (3rd) Top 10 charitable planning strategies for financial advisors under the new tax law and the SECURE Act. (4th) Repeat of Words that work., September 18, 2020. Webinar.
179. Susquehanna Valley Council of Charitable Gift Planners. *Top 10 legacy fundraising strategies from scientific research*. September 18, 2020. Webinar.
180. National Association of Charitable Gift Planners Leadership Institute. *Latest research findings on charitable estate planning.* September 16, 2020. Webinar.
181. North Carolina Charitable Gift Planners. *Using storytelling in legacy fundraising.* September 16, 2020. Webinar.
182. Oregon Community Foundation. *Philanthropy forum: Special charitable financial planning opportunities for September, 2020.* September 15, 2020. Webinar.
183. Charitable Gift Planners of Nebraska. (1st) *Wills that won't: Statistical evidence on charitable estate planning.* (2nd) *Raising major gifts of assets in the aftermath of Covid-19.* September 11, 2020. Webinar
184. Planned Giving Council of Greater Philadelphia. *New results from 100 years of national data on charitable estate planning.* September 11, 2020. Webinar.
185. New Hampshire & Vermont Council of Charitable Gift Planners. *Raising major gifts of assets in the aftermath of Covid-19.* September 10, 2020. Webinar.
186. Planned Giving Round Table of Northern Nevada / Estate Planning Council of Northern Nevada joint meeting. *Raising major gifts of assets in the aftermath of Covid-19: New strategies for a new world*. September 1, 2020. Webinar.
187. Association of Fundraising Professionals Tampa Bay Chapter / Charitable Gift Planners of Tampa Bay joint meeting. *Using storytelling in legacy fundraising: New findings, ancient origins, and practical tips.* August 18, 2020. Webinar.
188. Endowment Partners, Las Vegas, NV. *Estate planning data dive – Noncash Assets.* August 12, 2020. Webinar.
189. Association of Fundraising Professionals North Dakota – Northern Plains, *The importance of non-cash assets in long-term fundraising success.* July 20, 2020. Webinar.
190. The National Association of Charitable Gift Planners, *Town Hall: Latest research findings in planned giving.* July 17, 2020. Webinar.
191. The Nonprofit Times - The Fresh Research Podcast: Charitable estate giving research findings, July 9, 2020. Podcast.
192. The Community Foundation for Greater New Haven / Valley Community Foundation / Jewish Foundation of Greater New Haven. *Special financial planning opportunities with a focus on charitable planning*. June 25, 2020. Webinar.
193. PG Calc. *New results from 100 years of national data: The 10 most painful and pleasant statistical realities in bequest fundraising.* May 26, 2020. Webinar.
194. Donor Search "Unbound Conference Series". *Major gifts of assets in the aftermath of the COVID-19.* May 19, 2020. Webinar.
195. Big XII Universities Gift Planners Roundtable. *Encouraging major gifts of assets in the aftermath of the COVID-19 crisis.* May 13, 2020. Webinar.
196. MarketSmart. *The way forward: Recommendations for generating major gifts of assets in the aftermath of the Covid-19 crisis.* May 13, 2020. Webinar.
197. St. Jude's/ALSAC. *Philanthropy during the COVID crisis- revenue mitigation(co-presented with Eddie Thompson)*. May 7, 2020. Webinar.
198. The American College of Financial Services. *The hidden code of end-of-life decisions for financial planners (co-presented with Michael Finke).* April 24, 2020. Webinar.
199. Kansas City Estate Planning Symposium. *One time charitable planning opportunities for April 2020: COVID, CARES, and collapse of interest rates (presented twice).* April 23, 2020. Webinar.
200. American Heart Association. *Major and planned giving programs amidst COVID-19 (co-presented with Eddie Thompson)*. April 28, 2020. Webinar.
201. Thompson & Associates. *Raising major and planned gifts in the current environment (co-presented with Eddie Thompson)*. April 16, 2020. Webinar. https://ceplan.com/events/covid-19-webinar
202. Blackbaud / Accordant / Advancement Resources. *Raising major and planned gifts in the current environment (co-presented with Eddie Thompson)*. April 8, 2020. Webinar.
203. The Red Cross. *Using donor surveys in the current environment.* April 7, 2020. Webinar.

204. Freewill. *Dr. Russell James on planned giving and the Coronavarus crisis.* March 30, 2020. Webinar. https://resources.freewill.com/dr-russell-james-on-planned-giving-and-the-coronavirus-crisis
205. Hawai'i Community Foundation. *Top 10 charitable planning strategies for financial advisors.* March 18, 2020. Honolulu, HI.
206. Hawai'I Gift Planning Council Annual Meeting. 1st *Data on the power of asset gifts from 1 million nonprofit tax returns. 2nd Storytelling in legacy fundraising – New findings, ancient origins, and practical tips.* March 12, 2020. Honolulu, HI.
207. Jewish United Fund/Jewish Federation of Metropolitan Chicago. *Effective words and phrases for planned and major gifts.* March 5, 2020. Webinar.
208. Barnabas Foundation. *Best practices for planned giving websites*. February 12, 2020. Webinar.
209. The Estate Planning & Community Property Law Journal CLE Conference. *The Hidden Code of End-of-life Decisions - Research findings on financial and estate planning.* February 28, 2020, Lubbock, TX.
210. The Community Foundations Advancement Network (AdNet). *The hidden code of end-of-life decisions: What legacy fundraising can learn from decision-making in life insurance, annuities, estate planning, and healthcare*. November 7, 2019. Webinar.
211. Providence Foundations of Oregon (community hospital foundations). *Top 10 legacy fundraising strategies from scientific research: National data & results from the lab*. November 6, 2019. Webinar.
212. Great Legacy Fundraising Masterclass. *Donor hero stories in legacy fundraising.* Fort Augustus, Scotland. November 5, 2019. Webinar.
213. North Carolina Charitable Gift Planners. *Top 10 legacy fundraising strategies from scientific research: National data and results from the lab.* November 5, 2019. Webinar.
214. American Council on Gift Annuities. How to expand your gift annuity program: insights from the 2017 Survey of Charitable Gift Annuities. November 1, 2019. Webinar.
215. Hawai'i Community Foundation. Words that work for planned and major gifts in 2019. October 17, 2019. Webinar.
216. Barnabas Foundation. *The importance of asset-based fundraising.* October 16, 2019. Webinar.
217. Barnabas Foundation. *Communicating with seniors ages 75+*. October 2, 2019. Webinar.
218. Charitable Gift Planners of Central Ohio. *Top 10 legacy fundraising strategies*. September 11, 2019. Webinar.
219. Thompson & Associates. *Conversations with industry icons podcast series – Russell James.* September 3, 2019. Podcast.
220. CharityChannel. *Storytelling and fundraising*. June 25, 2019. Podcast.
221. Oklahoma City Community Foundation – Professional Advisor Conference. *Psychology, the brain, and words that matter*. June 6, 2019. Oklahoma City, OK.
222. Texas Society of CPAs - South Plains Chapter. *Top 10 charitable planning strategies for advisors under the new tax law: Helping your clients with charitable planning*. April 23, 2019. Lubbock, TX.
223. South Plains Trust and Estate Planning Council. *The hidden code of end-of-life planning.* April 18, 2019. Lubbock, TX.
224. Pentera nonprofit advising. *Using donor surveys in planned gift marketing – Academic research and practical applications.* April 17, 2019. Webinar.
225. Association of Fundraising Professionals – International Conference. *Using storytelling in planned giving: New findings on storytelling and gifts in wills.* April 1, 2019, San Antonio, TX
226. The Fundraising Talent Podcast #59. *Should fundraising professionals be all about story-telling or story-listening?* April 2, 2019. Podcast.
227. The Nature Conservancy (Trustee Legacy Ambassador Network). *How noncash gifts drive fundraising success.* March 19, 2019. Webinar.
228. Jewish Community Foundation of Greater Kansas City. *Words that work in major and planned gifts fundraising.* March 19, 2019. Webinar.
229. Fundraising Institute of Australia – National Conference. *Lessons from Overseas: Applying international insights to gifts in wills fundraising.* February 28, 2019. Melbourne, Australia.
230. Fundraising Institute of Australia – National Conference. [Six-hour masterclass] *Using storytelling in legacy fundraising: New findings, ancient origins, and practical tips.* February 27, 2019. Melbourne, Australia
231. The Nature Conservancy (Trustees). *Non-cash assets in fundraising success.* February 14, 2019. Webinar.
232. Planned Giving Group of New England. *Using surveys in planned gift marketing.* February 12, 2019. Webinar
233. PG Calc - Nonprofit Clients Webinar. *The hidden code of end-of-life decisions.* July 25, 2019. Webinar.
234. Association of Philanthropic Counsel. *New strategies and emerging demographics in planned giving*. January 25, 2019. Webinar.
235. Prizmah: Center for Jewish Day Schools. *Words that work in major and planned gifts fundraising.* January 31, 2019. Webinar.

236. Canadian Association of Charitable Gift Planners – Ottawa Chapter. *Using surveys in legacy and planned gift marketing.* January 25, 2019. Webinar.
237. Disciples Development Conference. *Types of gifts that drive growth… and other new fundraising discoveries.* January 16, 2019. New Orleans, LA
238. Texas Association of Community College Foundations. *Statistical analysis of the words and phrases that encourage planned giving.* November 29, 2018. Webinar
239. Planned Giving Round Table of Northern Nevada. *Charitable planning strategies for advisors under the new tax law*; (2nd) *What neuroimaging & experimental research reveal about donor motivations*. October 22, 2018. Reno, NV.
240. The National Conference on Charitable Gift Planning. *The real demographics of Baby Boomers*; (2nd) *One million 990s can't be wrong! Gifts of noncash assets (keynote).* October 19, 2018. Las Vegas, NV.
241. Mid-America Charitable Gift Planners Annual Conference. *How the origins of donor motivations drive powerful fundraising (keynote)*; (2nd) *Top ten charitable planning strategies for financial advisors: Helping your clients and your business with charitable planning*; (3rd) *The hidden code of end-of-life decisions: What legacy fundraising can learn from decision making in life insurance, annuities, estate planning, and healthcare (keynote)*. Sept 28, 2019. Kansas City, MO.
242. New Hampshire & Vermont Council of Charitable Gift Planners. *The hidden code of end-of-life decisions*; (2nd) *Top 10 legacy fundraising strategies from scientific research*. Sept 27, 2018. Lebanon, NH.
243. Maine Planned Giving Council Annual Conference. *Inside the mind of the planned giving donor (keynote)*; (2nd)*Top strategies for charitable financial planning in the new tax law*; (3rd) Co-presenter *What works in planned giving: A discussion of the latest results*; (4th) *Words that work in major and planned giving fundraising (keynote)*, Sept. 26, 2018. Portland, ME.
244. Charitable Gift Planners of Tampa Bay. *Top 10 fundraising legacy strategies*. Sept. 19, 2018. Clearwater, FL.
245. Practical Planned Giving Conference. *Top 10 legacy fundraising strategies from scientific research*. Sept. 18, 2018. Orlando, FL.
246. Charitable Gift Planners of Indiana. *How asset gifts create fundraising success.* Sept. 6, 2018. Skype presentation to Indianapolis, IN.
247. Colorado Planned Giving Roundtable Summer Symposium. Keynote – Top 10 legacy fundraising strategies from scientific research, August 23, 2018. Englewood, CO.
248. Colorado Planned Giving Roundtable. Presented all day pre-conference training: (Morning) *Talking touchy topics – the science of effective communication on end-of-life financial planning*. (Afternoon) *Top charitable planning strategies for financial, legal and philanthropic advisors under the new tax law*. August 22, 2018. Englewood, CO
249. The Nature Conservancy. *New results on the noncash gifts from IRS form 990 data*. August 17, 2018. Small group presentation to senior leadership with president Brian McPeek. August 17, Denver, CO.
250. The Stelter Group (sponsor). *Why cash is not king in fundraising. New results from 1 million nonprofit tax returns.* July 18, 2018. Webinar
251. Sullivan, Bruyette, Speros & Blayney, LLC, Financial Advisors, McLean, VA. *Charitable planning strategies under the new tax law*. July 16, 2018. Webinar.
252. Association of Fundraising Professionals – Fairbanks. *Top 10 legacy fundraising strategies from scientific research: National data & results from the lab.* June 29, 2018. Fairbanks, AK.
253. Anchorage Estate Planning Council / Alaska Community Foundation. *(1st) Words that work in major gifts, planned gifts, and charitable estate planning: Statistical analysis of the words and phrases that encourage planned giving; (2nd) Top 10 legacy fundraising strategies from scientific research: National data & results from the lab; (3rd) Top 10 charitable planning strategies for professional advisors under the new tax law; (4th) The hidden code of end-of-life decisions*. June 21, 2018. Anchorage, AK.
254. Arizona Community Foundation of Northern Arizona. *(1st) Top ten legacy fundraising strategies from scientific research; (2nd) Top 10 charitable planning strategies for financial planners; (3rd) The hidden code of end-of-life decisions: what financial advisors can learn from decision making in life insurance, annuities, estate planning, and healthcare.* June 15, 2018. Prescott, AZ.
255. The Planned Giving Council of San Antonio / The Association of Fundraising Professionals-San Antonio / The San Antonio Area Foundation. *(1st) From scientific research: The top 10 legacy fundraising strategies; (2nd) What predicts high growth fundraising: Shifting gifts from cash to assets.* June 12, 2018. San Antonio, TX.
256. New Jersey Council on Charitable Gift Planning Annual Conference. *(1st) Planned giving words that work: Results from experimental research; (2nd) Why cash is not king in fundraising: Results from 1 million nonprofit tax returns.* June 11, 2018. Bridgewater, NJ.
257. Leave a Legacy of Southeast Michigan Development Day Annual Conference. *(1st) Using donor surveys in planned gift marketing; (2nd) Natural philanthropy: How the origins of donor motivation drive powerful fundraising*. June 6, 2018. Livonia, MI
258. Create a Jewish Legacy Leadership Gathering / Life & Legacy Annual Conference. *(1st) The hidden code of end of life decisions; (2nd) Using surveys in legacy and planned gift marketing; (3rd) Top 10 legacy fundraising principles from scientific research: theory, statistics, and results from the lab.* June 4, 2018. Springfield, MA

259. Western Regional Planned Giving Conference. *(1st) The hidden code of end of life decisions; (2nd) Words that work in planned and major gifts; (3rd) Top 10 charitable planning strategies for financial advisors under the new tax law: Helping your clients and your business with charitable planning.* May 31, 2018. Costa Mesa, CA
260. The 24th Annual Arizona Planned Giving Conference. *(1st) The hidden code of end of life decisions: What legacy fundraising can learn from decision making in life insurance, annuities, estate planning, and healthcare; (2nd) Statistical analysis of the words and phrases that encourage planned giving; (3rd) Top 10 legacy fundraising strategies*. May 30, 2018. Phoenix, AZ
261. The Community Foundation of Arizona. *(1st) Natural philanthropy: How the origins of donor motivation drive powerful fundraising; (2nd) Using donor surveys in planned giving marketing; (3rd) Inside the mind of the planned giving donor; (4th) Wills that won't - Demographics of charitable estate planning*. May 29, 2018. Phoenix, AZ
262. The Nature Conservancy – Management Training. *Characteristics of high-growth fundraising organizations.* May 8, 2018. Webinar.
263. Gail Perry Associates – Planned Giving Training. *Inside the mind and motivations of the planned giving donor.* May 8, 2018. Webinar.
264. 33rd American Council on Gift Annuities Bi-Annual Conference. *Insights from the 2017 Survey of Charitable Gift Annuities (presented twice).* April 25, 2018. Seattle, WA.
265. The South Sound Planned Giving Council. *Why cash is not king in fundraising: Data on the power of asset gifts from 1 million nonprofit tax returns.* April 24, 2018. Tacoma, WA.
266. Susquehanna Valley Council of Charitable Gift Planners. *Top 10 legacy fundraising strategies from scientific research: national data and results from the lab.* March 16, 2018. Harrisburg, PA.
267. Everence Foundation Development Meeting for Nonprofit Organizations. *(1st) New results from IRS Form 990; (2nd) Neuroimaging results inside the mind of the charitable bequest donor.* March 16, 2018. Lancaster, PA.
268. Leading Age Philanthropy Lunch & Learn. *A 22-year study of charitable estate planning.* Sept 27, 2017. Webinar.
269. MarketSmart. *Using surveys in legacy fundraising.* September 20, 2017. Webinar.
270. Fundraising Institute of Australia – Include a Charity Campaign. *Inside the mind of the bequest donor for Australia* (1 hour); *Top 10 strategies for legacy gift marketing in Australia* (3 hours), Sept 15, 2017. Perth, Australia.
271. Fundraising Institute of Australia – Include a Charity Campaign. *Inside the mind of the bequest donor for Australia* (1 hour); *Top 10 strategies for legacy gift marketing in Australia* (3 hours), Sept 14, 2017. Adelaide, Australia.
272. Fundraising Institute of Australia – Include a Charity Campaign. *Inside the mind of the bequest donor for Australia* (1 hour); *Top 10 strategies for legacy gift marketing in Australia* (3 hours), Sept 13, 2017. Melbourne, Australia.
273. Fundraising Institute of Australia – Include a Charity Campaign. *Inside the mind of the bequest donor for Australia* (1 hour); *Top 10 strategies for legacy gift marketing in Australia* (3 hours), Sept 12, 2017. Sydney, Australia.
274. Fundraising Institute of Australia – Include a Charity Campaign. *Inside the mind of the bequest donor for Australia* (1 hour); *Top 10 strategies for legacy gift marketing in Australia* (3 hours), Sept 11, 2017. Brisbane, Australia.
275. Chabad Tomorrow (Orthodox Jewish Hasidic Planned Giving Organization). *Using surveys in planned giving.* July 19, 2017. Webinar.
276. Lubbock Association of Fundraising Professionals. *Words that work in major and planned gifts.* June 8, 2017. Lubbock, TX.
277. AdNet – Community Foundations Advancement Network. *A statistical analysis of the words that encourage planned & major gifts.* June 7, 2017. Webinar.
278. The Nature Conservancy Volunteer Leadership Summit. *Our world gift planning committee forum: Inside the mind of the philanthropic donor*. (my portion was filmed by a crew in Lubbock, TX and presented at the conference) June 21, 2017. Washington, D.C.
279. Kansas City Estate Planning Conference (UMKC). *(keynote) What your future client will look like: Demographic and statistical trends in charitable and non-charitable estate planning.* April 27, 2017. Overland Park, KS.
280. The Nature Conservancy. *The science of giving: Inside the mind of the bequest donor.* March 8, 2017. Webinar
281. PG Calc. *Counting revocable gifts: Back from fantasy Island*. January 26, 2017. Webinar.
282. Minnesota Planned Giving Council 40th Annual Conference. (1st, keynote) *What the latest neuroimaging and experimental psychology results tell us about donor decision making*; (2nd, breakout) *A 22 year national study of charitable planning additions, deletions, and ultimate estate transfers.* November 17, 2016. St. Paul, MN.
283. National Conference on Philanthropic Planning. *What's new in planned giving motivations and demographics research*. October 19, 2016. Dallas, TX.
284. Financial Planning Association of Greater Phoenix Symposium 2016: Applied Behavioral Finance. *Neuroscience as a foundation for understanding behavioral finance*. (keynote). September 28, 2016. Phoenix, AZ.

285. The Stelter Group (sponsor). *2016 Planned Giving Donor Trends: Who's Giving Today, Best Opportunities for Dollars Tomorrow* with Cheryl Sturm. August 15, 2016. Webinar.
286. Big 12 Development Conference. *Statistical analysis of the words and phrases that encourage planned and major gifts*. July 25, 2016. San Antonio, TX.
287. Pomona College Planned Giving Training Meeting. *Statistics and demographics in charitable estate planning*. June 17, 2016. Webinar.
288. Pomona College Development Training Meeting. *Testing words and phrased in planned and major gifts.* June 15, 2016. Webinar.
289. American Bar Association Law School Development Conference. *(1st) Statistical analysis of the words and phrases that encourage planned and major gifts; (2nd) A 20 year national study of charitable planning additions, deletions, and ultimate estate transfers.* June 2, 2016. San Diego, CA
290. American Council on Gift Annuities 32nd Conference on Planned Giving. *(Plenary) What's working today and what's coming tomorrow: new results from the lab and the latest demographics in planned giving.* April 8, 2016. St. Louis, MO.
291. The Nature Conservancy Global Summit. *Neuroimaging and charitable bequest decision-making.* March 24, 2016 San Antonio, TX.
292. The Estate Planning & Community Property Law Journal CLE Conference. *Results from a 20+ year national study on when people add and remove charitable estate beneficiaries and who ultimately makes actual gifts at death.* March 4, 2016, Lubbock, TX.
293. The National Conference of the Association of Lutheran Development Executives. *Inside the mind of the bequest donor. February 21, 2016. Words that work (1st), The secret to understanding planned giving (2nd),* February 22, 2016, Chicago, IL
294. The Nature Conservancy. Using surveys and survey research in planned giving: Theory to practice. January 13, 2016, online webinar.
295. Houston Jewish Community Foundation. (1st – for organizational members of the Create a Jewish Legacy Program) *What survey research tells us about words and phrases in charitable bequest decision-making,* (2nd – for board members of the Foundation) *Trends and research findings in major and planned giving decision-making.* January 7, 2016, Houston, TX
296. Oklahoma Planned Giving Council. *Neuroimaging and charitable bequest decision making,* November 12, 2015, Oklahoma City, OK.
297. Association of Lutheran Development Executives Lone Star Chapter & Lutheran Foundation of Texas. *Charitable giving: Legal and tax implications, trends and motivations* (2 sessions), November 11, 2015, Dallas, TX
298. North Texas Chapter of the Partnership for Philanthropic Planning. *It's all about the timing: a 20+ year study of the timing of charitable plan additions, deletions and ultimate transfers*, November 10, 2015, Dallas, TX
299. Partnership for Philanthropic Planning of Kentuckiana Annual Conference. (1st) *Words and phrases in major and planned gifts,* (2nd) *National statistics and trends in charitable bequest planning,* November 6, 2015, Louisville, KY
300. Joint Meeting of Association of Fundraising Professionals – Indiana and Planned Giving Group of Indiana. (1st) *Wills that won't – demographics and trends in charitable estate planning*, (2nd) *Words that work in major and planned gifts,* November 5, 2015, Indianapolis, IN.
301. Northern Illinois Planned Giving Council. (1st) *Charitable planning techniques for financial advisors,* (2nd) *Results from a 20+ year national study on when people add and remove charitable estate beneficiaries and who ultimately makes gifts at death,* (3rd) *What surveys from 10,000 people tell us about the words and phrases that encourage planned giving,* November 4, 2015, Rockford, IL
302. Stelter Company (a consulting group serving over 300 nonprofit organizations) Staff Training. *Review of Stelter's 2015 NMI Study,* (2nd) *Review of Words and Phrases in Gift Planning Brochures,* October 28, 2015, Des Moines, IA
303. Mid-Iowa Planned Giving Council Fall Conference. (1st) *What neuroimaging and experimental psychology tell us about charitable bequest decision-making and effective marketing*, (2nd) *What surveys from 12,000 people tell us about the words and phrases that encourage planned giving,* (3rd) *Charitable planning techniques for financial advisors,* October 26, Des Moines, IA.
304. National Conference on Philanthropic Planning. *New research findings in planned giving (Closing plenary),* with Bryan Clontz, October 23, Orlando, FL.
305. Virginia Gift Planning Council. (1st) *Charitable bequest demographics*, (2nd) *Inside the mind of the bequest donor*, October 15, Richmond, VA
306. South Sound Philanthropy Summit. (1st) *Using neurocognitive methods to encourage generosity*, (2nd) *Best charitable planning techniques for financial advisors and those who work with them*, October 8, 2015, Tacoma, WA
307. Plannedgiving.com. *Using surveys in planned gift marketing: Academic research and practical applications.* September 22 2015, online webinar.

308. Northwest Planned Giving Round Table Annual Conference. (1st) Mythbusters: Recent Research Impacting Gift Planning; (2nd) Wills that Won't: National statistics and trends in planned giving. September 17, 2015, Portland, OR.

309. Georgia Planned Giving Council Luncheon. *Words that work in planned & major gifts*. September 16, 2015, Atlanta, GA

310. Chesapeake Planned Giving Council Roundtable Conference. *Words that Work: What surveys from 10,000 people tell us about the words and phrases that encourage planned giving*. September 15, 2015, Baltimore, MD

311. London Legacy Conference – Institute of Fundraising (UK). *Inside the mind of the bequest donor.* September 14, 2015, online.

312. Joint meeting of the New Orleans Association of Fundraising Professional and the New Orleans Partnership for Philanthropic Planning. *Experimental results from words that work to encourage major and planned giving.* September 10, 2015, New Orleans, LA.

313. United Capital Private Wealth Counseling. *Charitable planning: Who does it, when they do it, and who will be doing it in the coming years*, August 24, 2015, online.

314. The Mid-America Planned Giving Council Annual Conference. *Demographics and statistics of charitable estate planning*, August 14, 2015, Kansas City, MO

315. The Jewish Federation of Orange County. *Using the words that work in planned giving*, August 11, 2015, Irvine, CA

316. Joint meeting of the San Diego Planned Giving Partnership and the San Diego Association of Fundraising Professionals. *(1st) The phrases that work in planned and major gifts: Results from experimental survey research; (2nd) An introduction to the law & taxation of charitable gift planning,* August 7, 2015, San Diego, CA

317. SDA Planned Giving and Trust Services Conference. *(1st Plenary) The statistics and demographics of wills, trusts, and non-probate charitable transfers; (2nd Plenary) Survey research results on words and phrases in charitable estate planning,* August 3, 2015; *(3rd Plenary) Inside the mind of the bequest donor: Results from neuroimaging and experimental psychology; (4th) The secret to understanding planned giving: A law & tax primer,* August 5, 2015, Calgary, Alberta, Canada

318. The National Council for Voluntary Organizations. *(with Richard Radcliffe) The great legacy debate,* July 3, 2015, London, England, UK

319. Remember a Charity Quarterly Conference. *Research on words and phrases in charitable bequests*, London, June 30, 2015, London, England, UK.

320. Create a Jewish Legacy Professional Leadership Gathering. *What results from 15,000 surveys tells us about phrasing the charitable estate planning request,* June 15, 2015, Chicago, IL

321. Society of Animal Welfare Administrators Annual Conference. *Using words that work to encourage charitable estate planning for animal welfare organizations,* June 12, 2015, Denver, CO

322. Northern California Planned Giving Council. *(1st) The demographics of charitable estate planning; (2nd) fMRI research into planned giving decision-making*, June 11, 2015, San Francisco, CA.

323. Memorial Sloan Kettering Cancer Center – Development Staff Training. *(1st) Messages that encourage bequest giving to cancer research charities; (2nd) Statistical analysis of charitable bequest behavior among cancer-diagnosed older adults, June 1, 2015, New York City, NY*

324. Philanthropic Planning Group of Greater New York City Annual Conference. *Words That Work for 2015: Statistical Analysis of the Words and Phrases That Encourage Planned Giving,* May, 28, 2015, New York City, NY.

325. Central Ohio Conference on Planned Giving (Central Ohio Planned Giving Council). *(1st) Results from a 20 plus year national study on when people add and remove charitable estate beneficiaries and who actually makes charitable gifts at death (2nd) What surveys from 10,000 people tell us about the words and phrases that encourage planned giving*, May 21, Columbus, OH

326. The Columbus Foundation – Professional Advisor Council Meeting. *The Science and Psychology of Effective Planned Giving: Using Words That Work*, May 21, Columbus, OH

327. Greater Cincinnati Planned Giving Council. *Wills that won't: Demographics of charitable estate planning,* May 20, 2015, Cincinnati, OH

328. WorldVision World Headquarters – Leadership Training Session. *New research results on the demographics and timing of charitable bequest decision-making.*, May 15, 2015, Federal Way, WA

329. Washington Planned Giving Council Annual Planned Giving Day. *(1st Plenary) Words that work in charitable estate planning; (2nd Plenary) It's the end of the will as we know it,* May 14, 2015, Seattle, WA

330. Planned Giving Council of Greater Memphis and the Community Foundation of Greater Memphis Joint Meeting, *Key demographics and best techniques in charitable estate planning,* May 12, 2015, Memphis, TN

331. Fundraising Institute of Australia: Bequest Special Interest Group, *Mythbusters for Australia: What recent research reveals about charitable estate planning in the U.S., U.K., & Australia,* May 11, 2015, Melbourne, VIC, Australia [via Skype]

332. Carter Center's Planned Giving Advisory Council. *(1st) Uncovering charitable estate planning behavior in the Health and Retirement Study; (2nd) fMRI insights into bequest donor behavior.* May 8, 2015, Atlanta, GA

333. Annual Conference ("Planned Giving Day") Northern Ohio Planned Giving Council. *(1st, Plenary) The neuroscience of charitable decision-making; (2nd) The new demographics of planned giving (updated for 2015)*, May 7, 2015, Cleveland, MA
334. Cleveland Foundation – Employee Training Session. *Best phrases in gift planning communications.* (followed by guiding roundtable discussion for several practical implementation groups), May 7, 2015
335. Annual Conference of Planned Giving Group of New England. *(1st, Plenary) What neuroimaging and experimental psychology tell us about communicating with planned giving donors; (2nd) A review of the latest research from 15,000 surveys telling us about the words and phrases that encourage planned giving*, May 6, 2015, Boston, MA
336. Opus Presents by Opus Advisors. *Inside the mind of the bequest donor*, April 29, 2015, Rye Beach, NH
337. State Street Global Advisors: Charitable Asset Management Annual Gift Planning Conference. *Aging, Demographics, and statistics of charitable estate planning*, April 28, 2015 Boston, MA
338. Annual Canadian Association of Gift Planners Conference. *Keynote – Neuroimaging and the charitable bequest donor*, April 24, 2015 Halifax, NS, Canada
339. 13th Annual Gulf Coast Regional Planning Gift Planning Conference: Philanthropic Financial Planning. *Keynote - Statistical analysis of the words and phrases that encourage planned giving*, April 23, 2015 Houston, TX
340. University of Texas Health Science Center at Houston. *Neuroimaging and experimental psychology in planned giving*, April 22, 2015, Houston, TX
341. CASE (Council for Advancement and Support of Education) District IV Conference. *Words That Work: What Surveys from 10,000 People Tell Us About the Words and Phrases that Encourage Planned Giving*, April 13, 2015 Austin, TX. *Awarded "Stellar Speaker" Designation for receiving overall speaker evaluations of 4.83 on 5 point scale
342. The Hospital Fundraising Summit. *New neuroimaging results from inside the mind of the bequest donor*, April 7, 2015 online
343. The Hospital Fundraising Summit. *The words that work in major and planned gifts*, April 10, 2015 online
344. The Nature Conservancy. *Bringing theory to practice for TNC in planned giving communication*, March 26, 2015, (via webex) San Francisco, CA
345. World Wildlife Fund International Webinar. *Words and phrases to encourage giving in a will*, February 24, 2015, online with participants from US, UK, Canada, The Netherlands, Asia and Australia.
346. Greater Miami Jewish Federation. *Inside the mind of the bequest donor: The neuroimaging and experimental psychology of planned gift marketing,* February 12, 2015, Miami, FL
347. National Conference of Bar Foundations Mid-Year Meeting. (1st) *Inside the mind of the bequest donor*, (2nd) *Words that work in major and planned giving*, February 6, 2015, Houston, TX
348. Salvation Army Southern Territory Training Conference. *The phrases than encourage generosity in major and planned gifts*, February 5, 2015, Atlanta, GA
349. Association of Philanthropic Council. *Neuroimaging and testing phrases in major and planned gifts,* January 30, 2015, Ft. Worth, TX
350. Marketsmart Webinar. *Golden nuggets from ivory towers – New research results in gift planning*, January 29, 2015, online
351. Canadian Association of Gift Planners. *The 2015 results: Words that work in major and planned gifts*, January 28, 2015, online
352. Seton Health Care Professional Advisory Council. *Research Update: Inside the mind of the bequest donor for 2015,* January 14, 2015, 8:00 a.m., Austin, TX
353. Seton Health Care Foundation Staff. *Research Update: Inside the mind of the bequest donor for 2015,* January 14, 2015, 10:00 a.m., Austin, TX
354. Partnership for Philanthropic Planning San Antonio. (1st) *What neuroimaging and experimental psychology tell us about charitable bequest planning,* (2nd) *An introduction to planned giving law and taxation,* January 13, 2015, San Antonio, TX
355. Ft. Worth Association of Fundraising Professionals. *American charitable bequest demographics for 2015*, January 12, 2015, Ft. Worth, TX.
356. Marketsmart Webinar. *Words that work: Encouraging planned giving*, November 14, 2014, online
357. National Association of Cancer Center Development Officers. *Messages that encourage bequest giving to cancer research charities.* November 20, 2014, Webinar
358. Chicago Council on Planned Giving. (1st) *Wills that won't: Statistics of charitable estate planning,* (2nd) *Neuroimaging and charitable estate planning*, November 11, 2014, Chicago, IL
359. Marketsmart Webinar. *Mythbusters: Recent research impacting gift planning.* October 29, 2014, online
360. Arkansas Charitable Gift Planning Council. (1st) *Inside the mind of the planned giving donor: What neuroimaging and experimental research reveals about donor motivations*. (2nd) *Wills that won't: A 20 year national study of charitable planning additions, deletions, and ultimate estate transfers*. October 23, 2014, Bentonville, AR

361. The Advancement Network for Community Foundations. *The neuroscience of philanthropy. Lessons for marketing in current and bequest giving*, October 19, 2014, Cleveland, OH.
362. National Conference on Philanthropic Planning. Plenary Address. *Golden nuggets from ivory towers: Recent powerful research impacting gift planning* (with Bryan Clontz), October 16, 2014, Anaheim, CA
363. Practical Planned Giving Conference. Plenary Address. *Making the new bequest demographics work in your favor.* Breakout Session. *Understanding the mind of the bequest donor: New results from neuroimaging research*, September 29, 2014, San Diego, CA
364. Alabama Planned Giving Council. *Looking inside the mind of the bequest donor – What neuroimaging and experimental psychology tell us about marketing messages*, September 18, 2014, Birmingham, AL
365. PG Calc Webinar. Communicating effectively about bequests: What 4,500 test subjects tell us, August 28, 2014, online
366. Colorado Planned Giving Roundtable Summer Symposium. Plenary. *Inside the mind of the bequest donor*. August 27, 2014, Denver, CO.
367. Texas Tech University System Institutional Advancement Retreat. *New research findings about encouraging planned giving.* August 19, 2014, Lubbock, TX
368. West Texas Financial Planning Association. *Financial planners and the new demographics of charitable estate planning.* July 24, 2014, Lubbock, TX
369. Association of Philanthropic Counsel Summer Forum. *Surveys, statistics, and neuroimaging – Understanding philanthropy decision making.* June 20, 2014, Denver, CO
370. Western Regional Planned Giving Conference. (1st) *Brain mapping.* (2nd) *Research on specifics of bequest demographics.* May 29, May 30 2014 Costa Mesa, CA
371. North Texas Chapter of the Partnership for Philanthropic Planning. *Inside the mind of the bequest donor: New research findings in neuroimaging*, May 6, 2014, Dallas, TX.
372. Greenpeace International Legacy Skill Share. *Neuroimaging and charitable bequest decision-making*, April 30, 2014, Amsterdam, The Netherlands (via video conferencing)
373. MarketSmart webinar. *Wills that won't,* April 22, 2014, online.
374. American Council on Gift Annuities Conference. *New results from research – when and how charitable bequest decisions are made*, April 9-11, 2014, Baltimore, MD.
375. Big 12 Development Conference. *Using neuroimaging to understand donor decision-making*, March 25, 2014, Austin, TX.
376. Association of Fundraising Professionals 51st International Conference on Fundraising. *What do we really know about philanthropy and fundraising?* (with Krishnan Mehta, Jan Brazzell, & Melissa Brown), March 24, 2014, San Antonio, TX.
377. Partnership for Philanthropic Planning of Greater Orlando & Association of Fundraising Professional of Greater Orlando Joint Meeting. *What donors are dying to tell you: Tracking 20 years of lifetime estate plan changes and over 10,000 ultimate distributions*. March 19, 2014, Orlando, FL.
378. Salvation Army Southern Territory Planned Giving Conference. *The mind of the bequest donor.* March 11, 2014, Delivered via Skype, Atlanta, GA.
379. CASE (Council for Advancement and Support of Education) District II. Supersession:*Tracking charitable bequest plans: A 20 year national study of additions, deletions, and ultimate transfers*, February 9, 2014 Baltimore, MD. *Awarded "Stellar Speaker" Designation for receiving overall speaker evaluations of 4.73 on 5 point scale
380. Planned Giving Council of Central Texas. *Tracking charitable bequest plans: A 20-year national study of additions, deletions and ultimate transfers*, December 16, 2013, Austin, TX.
381. Planned Giving Council of Houston. (1) *Inside the mind of the bequest donor* , (2) *American charitable bequest demographics*, December 5, 2013, Houston, TX.
382. American Cancer Society - Nationwide Gift Planning Advisor Council Meeting. *Wills that won't: New evidence on will document usage*, October 23, 2013, online.
383. National Conference on Philanthropic Planning. *Trending forward: Emerging demographics driving planned giving (with Jackie Franey),* October 15-16, 2013 Minneapolis, MN.
384. Lubbock Area Association of Fundraising Professionals. *New results on neuroimaging and charitable bequest decision-making*, October 10, 2013 Lubbock, TX.
385. BNY Mellon Charitable Client Conference. *New demographic trends driving bequest giving,* September 26, 2013, Dallas, TX.
386. MarketSmart webinar. *Brain science and charitable planning,* September 18, 2013, online.
387. Planned Giving Council of Central Texas. *Planned giving and the brain*, August 19, 2013, Austin, TX.
388. Institute of Fundraising Legacy Marketing Group – United Kingdom. *Inside the mind of the legacy donor*, July 17, 2013, London, England.
389. Remember A Charity Member Meeting – United Kingdom. *Experimental results of marketing interventions to encourage legacy giving*, July 16, 2013, London, England.

390. National Capital Group Planned Giving Council Annual Conference. *Keynote speaker: Inside the mind of the bequest donor,* May 30, 2013, Arlington, VA.
391. PBS (Public Broadcasting Service) National Planned Giving Workshop. (1) *Introduction to planned giving products,* (2) *Gifts of special assets: Remainder deeds, life insurance, retirement plans,* (3) *Gifts that generate income: Gift annuities,* (4) *Gifts that generate income: Charitable remainder trusts and advanced combinations,* May 13, 2013, Miami, FL.
392. United Capital Private Wealth Counseling Online Webinar. *Top 10 charitable planning strategies for financial advisors,* March 25, 2013, online.
393. American Cancer Society Gift Planning Advisor Council Webinar. *Building the scorecard: Estimating propensity for charitable estate giving,* March 21, 2013, online.
394. The Sharpe Group. (1)*Tracking trends, transfers, and timing in charitable bequests,* (2) *Messages to encourage charitable bequests: Testing new finding from neuroimaging,* (3) *Inside the mind of the bequest donor: Research findings from experimental psychology and neuroimaging,* March 19, 2013, Memphis, TN.
395. Texas Tech Department of Personal Financial Planning "Opportunity Days" Continuing Education Seminars. *Charitable planning for fun and profit*, February 28, 2013, Lubbock, TX.
396. The Sharpe Group. *Neuroimaging findings and bequest donations*, Jan. 17, 2013, online.
397. United Kingdom Legacy Marketing Group Professional Association. *Hidden forces in marketing charitable legacies: What research in demographics, psychology, and neuroscience can tell us about legacy decision-making*, June 28, 2012, London, England, UK
398. Lubbock Area Association of Fundraising Professionals. *Planned giving and the brain: New fMRI results reveal how charitable decisions are made*, June 14, 2012, Lubbock, TX.
399. Big 12 Gift Planning Conference. *Charitable Bequest Decision-Making: Practical Lessons from Research Findings*, June 6, 2012
400. West Texas Women's CPA Association. *Charitable Gift Planning 2012: Tax Tips, Techniques, and Trends,* May 17, 2010, Lubbock, TX.
401. American Cancer Society Gift Planning Advisor Council Webinar. *American Cancer Society – Bequest Donor Acquisition and Maintenance*, October 21, 2011, online.
402. Annual Summit on Emergency & Disaster Planning for Colleges, Universities, and K-12 Schools. *Designing violence out of schools: How careful school building design prevents violence and increases student safety*, October 5, 2011, Toronto, Canada.
403. Sunset Bible Institute. *Development of an Effective Planned Giving Program*, July 12, 2011, Lubbock, TX.
404. World Wildlife Fund International Webinar. *Research Findings on Bequest Donor Acquisition and Maintenance*, June 16, 2011, online with participants from US, UK, Canada, The Netherlands, Asia and Australia.
405. Lubbock Area Association of Fundraising Professionals. *Cracking the Generosity Code: Applying Academic Theory to Fundraising Practice*, June 9, 2011, Lubbock, TX.
406. Christian Restoration Association. *Creating a free online education product (with examples from EncourageGenerosity.com)*, May 20, 2011, Mason, OH.
407. Financial Planning Association Retreat. *This Is Your Brain on Finances: Advising Imperfect Humans.* May 4, 2011, Bonita Springs, FL.
408. Lubbock Area Association of Fundraising Professionals. *Tax Tips, Techniques, Trends and Tomorrow*. March 10, 2011, Lubbock, TX
409. Community Foundation of Ireland – Legacy Promotion Ireland. *Effective Promotion of Legacy Giving: A Presentation of New Research Findings and Theory.* July 26, 2010, Dublin, Ireland.
410. Jewish Federation of Greater Atlanta. *Charitable estate planning within the Jewish community*. January 21, 2009, Atlanta, GA.
411. Georgia Planned Giving Council. *New Findings From a 12-year Study of Charitable Estate Planning in Older Adults.* September 15, 2009, Athens, GA.
412. Housing Demographics and Research Center Board of Advisors Meeting. *Quick Summaries of New Research on Residential Satisfaction and Multifamily Housing.* May 19, 2009, Atlanta, GA.
413. National Association of Home Builders International Builders Show – NAHB Multifamily Council. *Residential property management at the University of Georgia*. February 6, 2007, Orlando, FL.
414. Athens Apartment Association & Georgia Apartment Association. *Fair Housing principles in advertising – What residential property managers should know.* November 13, 2006, Athens, GA.

Teaching

Ph.D. dissertation chair

Lisa Green (in progress) "Differences in educational and other charitable giving among Asian-American groups"

Catherine Michalka (in progress) "Determinants of long-term wealth accumulation: Financial planning time

horizon, advisor use, and portfolio allocations."
Thomas Langdon (in progress) "Estate planning decision making: Experimental and demographic findings."
Eiman Osseilan (initial appointment: Jeddah, Saudi Arabia, Batterjee Academy). "Investigation of characteristics of charitable giving: Evidence from IRS Form 990". May 2021.
Ying Yang (initial appointment: Assistant Professor at Eastern New Mexico State University faculty). "Three essays on life annuity and life insurance." August 2020.
Yi Liu (initial appointment: Assistant Professor at College for Financial Planning). "Three essays about behavioral factors on investing and spending." June 2020.
Reem Hussein (initial appointment: Prudential Financial and Shepherd University). "Three essays on end-of-life planning." May 2020.
Davaajargal Dorjsuren (initial appointment: Assistant Professor at Campbellsville University) "Three essays on the impact of tax incentives and determinants of charitable giving." April 2019.
Jennifer Lehman (initial appointment: University of Utah faculty) "Three essays on special donation types: (1) Race and religious bequest giving attitudes, (2) Charitable estate planning among donors to different types of charities, (3) Consumption capital and distinctive characteristics of donors to arts." May 2018.
Zhikun Liu (initial appointment: Researcher at Great-West Financial in Denver) "Three essays on financial planning horizon: (1) Factors affecting will and trust ownership, (2) Determinants and significance of financial planning horizon changes, (3) Finding the next major donor – the relationship between financial planning horizon and charitable giving" June 2018.
Jacob Williams (initial appointment: Director of planning and research at Helmstar Group in Boise) "Three essays on annuitized income during retirement: (1) Satisfaction with annuities, (2) Commercial annuity preferences and mortality salience: The role of symbolic immortality, (3) Incorporating social security into the reverse mortgage decision" June 2017.
Michael Guillemette (initial appointment: Assistant Professor at University of Missouri) "Three essays on risk tolerance and loss aversion under cognitive load: (1) Risk tolerance questions to best determine client portfolio allocation preference, (2) Risk preferences under cognitive load, (3) Risk tolerance by habit or loss averse, sentiment-driven investor?" May 2013.
Benjamin Cummings (initial appointment: Assistant Professor at St. Joseph's University) "Three essays on the use and value of financial advice: (1) The impact of cognitive ability and financial planners on Roth IRA adoption and ownership, (2) Determinants of beginning and ending the use of a financial advisor among older adults, (3) The impact of financial advisors on the subsequent wealth of older adults" March 2013.
Scott Garrett (initial appointment: Scholar in Residence – CFP Board, Washington, DC) "Three essays on cognitive processes in financial decision-making: (1) Financial ratios and perceived household financial satisfaction, (2) Long-term care insurance and numerical cognitive decline, (3) Numeracy and responses to common financial literacy questions among older adults." September 2012.

Ph.D. dissertation committee member

External universities

Susan Abtouche, Eastern University, "Organizational and leadership factors influencing resident charitable giving in retirement communities: A constructivist grounded theory study" [in progress].
Robert Steen, The American College of Financial Services, "Determinants of estate administration length using the Health and Retirement Study Exit Files" [in progress]
Bryan Clontz, The American College of Financial Services, "The relationship between gift annuity solvency and disparate statutory insurance regulation", May 2018.
John Ronquillo, The University of Georgia, "The Climate for innovation in public and nonprofit organizations: an analysis of perceptions on motivation, flexibility, and work environment" June 2011.
Anna R. Erickson (Masters thesis – External Examiner), University of Kwazulu-Natal, Durban, South Africa, "Who gives to international development? The determinants of giving to international versus domestic causes by private donors in the US", December 2010

Home university

Gary Curnutt, Texas Tech University, "Three essays on post-retirement labor" [in progress].
Jayson Cantu, Texas Tech University, "The mental and physical well-being of older Americans: Three essays analyzing the health and retirement nexus focusing on the veteran population" [in progress]
Di Qing, Texas Tech University, "Three essays examining the consumer behavior on the student loans", May 2022.
Muna Alabed, Texas Tech University, "Three essays on aging, risk tolerance, financial literacy, and financial satisfaction," December 2021.
Tiffany Murray, Texas Tech University, "Three essays examining collegiate financial wellness", August 2021.
Kaplan Sanders, Texas Tech University, "Three essays on medical student debt and physician satisfaction" May 2021.
Blaine Pearson, Texas Tech University, "Three essays exploring the migration of retirees and the associations between migration and retirees' well-being." August 2020.
Thomas Korankye, Texas Tech University, ""Three essays on student debt and college savings", May 2020.
Christopher Crouch, Texas Tech University, "Three essays on the risk of retirement and the correlates of retirement satisfaction." November 2019.
Hossein Salehi, Texas Tech University, "Three essays on insurance planning for older Americans." June

2019.
Xiawu “Sean” Zhang, Texas Tech University, “Three essays on household portfolio choice.” June 2019.
Eakamon Oumtrakool, Texas Tech University, “Three essays on the time use and well-being of retirees.” October 2018
Lua Augustin, Texas Tech University, “The impact of financial education and financial literacy over three life periods.” August 2018.
Maher Alyousif, Texas Tech University, “Three essays on financial advice-seeking behavior.” March 2017.
Taft Dorman, Texas Tech University, “Three essays on financial planning for college” June 2016.
Patrick Payne, Texas Tech University, “Risk and financial satisfaction.” April 2015.
Janine Scott, Texas Tech University, “Three essays on human capital protection” July 2013.
Chris Browning, Texas Tech University, “Managing retirement assets: evidence from the HRS.” August 2013.

*Courses - Texas Tech University, Lubbock, TX (*denotes new course creation)*

*PFP 5328: Planned Giving Demographics and Decision Making (2019-present)
*PFP 5325: Introduction to Charitable Planning (2010-present)
*PFP 5326: Advanced Charitable Planning (2011-present)
*PFP 5327: Charitable Giving: Research, Theory, & Marketing (2011-present)
*PFP 5000: Introduction to Business Law for PFP (2014-present)
PFP 5385: PFP Perspectives on Behavioral Finance (2013-present)
Built new curriculum in behavioral finance/econ used by professors in courses at the following institutions:

U.S.: Yale University (Ian Ayres-Yale Law School) ; University of Michigan (Erin Krupka-Information Sciences); Ohio State University (Jodi Letkiewicz-Consumer Sciences; Rebecca Naylor-Marketing); Pennsylvania State University (Janet K. Swim-Psychology); University of Kentucky (Aaron Yelowitz-Economics); University of Kansas (Promothes Chattergee-Marketing); Kansas State University (Bryan Schurle-Agricultural Economics) ; University of Alabama (Cliff Robb-Consumer Science) ; University of Georgia (Melissa Wilmarth-Consumer Economics); Utah State (Jean Lown-Personal Finance); Rutgers University (Jamie Walkup – Psychology); University of Minnesota – Duluth (Rajiv Vaidyanathan-Marketing); California State University – Fullerton (Kristin KleinJans-Economics); University of Pittsburgh (Cait Lamberton-Business); State University of New York at Stony Brook (Warren Sanderson-Economics); Baruch College-City University of New York (Sunaina Chugani-Marketing); Temple University (Donald Wargo-Economics); California State University, Northridge (Yoko Mimura-Consumer Affairs); South Dakota State University (So Hyun Cho-Consumer Sciences); Long Island University (Udayan Roy-Economics); Eastern Illinois University (Sally Ryan-Psychology); Dominican University (K. R. Vishwanath-Management); Rollins College (Kenna Taylor-Economics); Florida International University (Kimberly Taylor-Marketing); University of West Florida (Steve LeMay-Economics); Penn Valley Metropolitan Community College (Dan Fitzgerald-Applied Language); Highline Community College (Bob Baugher-Psychology); Texas State University (Joni Charles-Finance & Economics); University of Illinois: Urbana-Champaign (Yanina Pepino-Nutrition; Sterling Raske-Finance); Keene State College (Stephen Clark-Psychology); Minnesota State University (Jae Min Lee-Consumer Studies); Louisiana State University (James R. Van Scotter-Information Systems & Decision Sciences); Seattle University (Joseph Barnes-Marketing)

International: Paris School of Economics (Claudia Senik-Economics) ; Helsinki University of Technology (Jan-Erik Tarpila-Organizational Leadership); Zurich University of Applied Sciences (Sandro Graf-Marketing); IE University, Madrid, Spain (Ellen Newman-Education); Kozminski University, Warsaw, Poland (Anna Baczynska-Economic Psychology); Economic Research Institute of Northern Ireland (Jose Luis Iparraguirre-Economics of Ageing); University of Canberra, Australia (Greg Barrett-Economics); Université Laval, Québec City (Rémi Desmeules-Marketing); University of Western Ontario - Brescia (Colleen Sharen-Marketing); Royal Roads University, Victoria, British Columbia, Canada (Kim Moller-Marketing); Ege University, Izmir, Turkey (Cihat Gunden-Agricultural Economics); Universite Mohammed V de Rabat-Agdal-Maroc, Morocco, (Mariem Liouaeddine-Education) ; INCAE Business School, Managua, Nicaragua (Eduardo Luis Montiel-Finance); Universidad Nacional De San Martin, Argentina (Ariel Di Stefano-Marketing); The Chinese University of Hong Kong (Dongshu Ou-Educational Policy); INSEAD-Singapore (Neil Bearden-Decision Sciences); Beijing Normal University (Xiaomin Sun-Judgment & Decision Making); Shaanxi Normal University (Zhanbing Huang-Business); Regent’s University London (Jana Martiskova-Lecturer); Asian Institute of Management-Manila, Phillipines (Emmanuel Leyco-Finance); Nürtingen-Geislingen University, Germany (Carsten Lausberg-Economics & Law); IE Business School, Madrid, Spain (Kiron Ravindran-Information Systems); TOBB University of Economics and Technology, Ankara, Turkey (Unay Tamgac); Glasgow Caledonian University, Scotland (Jose Luis Pinto Prades-Health Economics); The University of Auckland (Don Sheridan – Information Systems); Mod’Art International Paris (Casandra Prost-Design); BRAC University, Dhaka (Md. Nazrul Islam – Medicine); University of Murcia, Spain (Fernando Sanchez-Spanish Culture); Dalhousie University, Halifax (Tracy Taylor-Helmick, Psychology); Hanze University of Applied Sciences (Jacquelien Rothfusz, Labour Economics); Institute of Sociology, Academia Sinica, Taiwan (Ly-yun Chang-Sociology); University of Zagreb, Croatia (Mislav Ante Omazic-Economics); Ege University, Izmir, Turkey (Cihat Gunden-Economics)

*PFP 5175/ECE 5120: fMRI Study Design and Analysis (2011)
*PFP 5175: Financial Happiness: Satisfaction in Spending & Saving (2012, 2013)
2012 Instructor of the Year – Department of Personal Financial Planning
Teaching Academy Member (2015-present)

Courses - University of Georgia, Athens, GA
*HACE 5310/7310: Managing Nonprofit & Special Community Housing (2007, 2008, 2009, 2010)
*HONS 1999H: Social Science and the Study of Human Happiness (2009)
*HACE 1110: Consumers in Society [Applications of Behavioral Economics] (2009, 2010)
HACE 3300: Housing in Contemporary Society (2006, 2007, 2008, 2009)
*HACE 4320/6320: Legal Issues in Residential Property Management (2006, 2007, 2008, 2009)
2009 Outstanding Teacher of the Year – Department of Housing & Consumer Economics
2009 Outstanding Teacher of the Year – College of Family & Consumer Science

Courses - University of Missouri, Columbia, MO
FINPLN 4393/7393: Financial Planning - Estate and Gift Planning (2006)
*CFE 393/493: Estate and Gift Taxation and Planning (1998,1999)

Courses - Central Christian College, Moberly, MO
*PCM 323: Principles of Finance & Law (1996, 1998, 2004, 2005)
*PCM 328: Legal Issues in Counseling (1997, 1999, 2002, 2005)
*GHS 261: Principles of Microeconomics (1999, 2003, 2004)
*PCM 384: The Economics of Church and Sect Growth (2002)
*GHS 143: American Government (1994, 1996, 1998)
*PCM 325: Churches, Ministers, & The Law (1995, 1997)
GCA 131: Oral Communication (1995, 1996)
GCA 021: Study Skills & Strategies (1995)
*GHS 351: Religious Liberties and the Law (1994)

Professional Service

Professional Organizations and Certifications
Association of Fundraising Professionals Research Council – Member (2009-present)
AFP Research Prize Book Award Committee – Chair (2011-2015), Member (2009-present)
Giving USA Advisory Council on Methodology – Member (2011-present)
American Council on Gift Annuities Research Committee – Member (2016-present)
The Aspen Institute – IRS Form 990/AWS "Open Data Collective" Working Group (April 2019-present)
Certified Financial Planner Board of Standards
Certified Financial Planner® (2010-present)
Subject matter expert and CFP® examination item writer (2013)
Center on Philanthropy at Indiana University – Million Dollar List Methodology Advisory Council (2011-2013)
American Economic Association – Member (2006-present)
American Council on Consumer Interests - Board of Directors (2010-2013)
Housing Education and Research Association, Treasurer (2008-2010), Early Career Award (2008)
Ordained into the ministry by the Union Avenue Christian Church, Moberly, Missouri (2000)

Associate Editor
The Journal of Consumer Affairs: 2010-2013

Editorial Board Member
Journal of Financial Counseling and Planning: 2011-2013

Academic Journal Reviewer
Journal of Financial Planning & Counseling
Journal of Financial Therapy
Journal of Personal Finance
Financial Services Review
Southern Economic Journal
Journal of Economic Behavior and Organization
Applied Economics
Nonprofit and Voluntary Sector Quarterly
Nonprofit Management & Leadership
International Journal of Nonprofit & Voluntary Sector Marketing
Journal of Public and Nonprofit Affairs
Philanthropy & Education
Voluntas: International Journal of Voluntary and Nonprofit Organizations
The Journal of Public Relations Research
The Sociology of Religion: A Quarterly Review
Review of Religious Research
Journal of Happiness Studies
Housing & Society
The Journal of Housing and the Built Environment
The Journal of Urban Planning and Development

Housing Policy Debate
Neurology, Psychiatry and Brain Research
2011 Best Reviewer Award – *Journal of Consumer Affairs*

Government advisor

Advisor to officials in the South Korean Office of the President, South Korean Office of the Prime Minister, South Korean Ministry of Public Administration and Security, and The Beautiful Foundation of South Korea in support of legislation on planned giving in South Korea.

Advisor to British Minister of Housing and Planning's Review of the Private Rental Sector conducted by Dr. Julie Rugg and Dr. David Rhodes of the University of York (provided comparative policy frameworks in the U.S., with in-depth description of the Low-Income Housing Tax Credit program)

Media Citations

NPR – Marketplace. *Why do TV commercials for charities ask for $19 a month?* By Jane Nguyen, January 13, 2022. https://www.marketplace.org/2022/01/13/why-do-tv-commercials-for-charities-ask-for-19-a-month/

WilmingtonBiz. *Get an even higher ROI on your appreciated stock.* By JC Lyle, December 14, 2021.

Digital Journal. *The REAL agents of change: Evolving real estate through charitable giving.* November 2, 2021.

Successful Fundraising. *Pose questions to advance your donors' journey.* November 2021, p. 8.

The Nonprofit Times. *Estate plan targeting in 10 steps.* September 16, 2021.

Forbes. *Charitable bequests could be the key to crisis management.* By Kristen Jaarda, July 26, 2021.

The Chronicle of Philanthropy. *Pandemic giving, donors and tax breaks, MacKenzie Scott's latest gifts.* By Stacy Palmer & Dan Parks, June 19, 2021.

The Chronicle of Philanthropy. *Giving grew in a tumultuous year but not for all.* By Eden Stiffman & Michael Theis, June 15, 2021.

The Chronicle of Philanthropy. *How to boost your fundraising this spring.* By Emily Haynes, April 26, 2021.

The Chronicle of Philanthropy. *7 rules for marketing planned gifts to donors.* By Lisa Schohl, January 5, 2021.

The Nonprofit Times. *Bequests don't track with donors' recent giving.* October 6, 2020.

The Nonprofit Times. *Study shows 75 is the magic number for bequests.* September 28, 2020.

The New York Times. *Weighing pandemic risks when donating to colleges*. By Paul Sullivan, September 4, 2020.

MarketWatch. *What top financial advisers will tell you about creating a lasting legacy for the important people and causes in your life.* By Morey Stettner, July 31, 2020.

Planned Giving Tomorrow. *The future of planned giving.* By Karen Martin, Fall, 2020.

The Fundraiser. *How to evoke nostalgia in your legacy campaign.* By Rob Cope, July 13, 2020.

Advisor Perspectives. *The physical impossibility of death in the mind of someone living.* By Michael Finke, June 15, 2020.

The Daily Toreador. *Carelessness, financial ignorance add to student debt.* By Adan Rubio, September 4, 2020.

The Buffalo News. *Sixing up the president by his cognitive traits.* By Marguerite Battaglia, September 3, 2019.

AARP. *How to give to charity – and save on taxes.* By Ellen Stark, November 27, 2018 https://www.aarp.org/money/taxes/info-2018/tax-law-charitable-donations.html

UK Fundraising. *Australian legacy fundraisers learn from their UK counterparts*. by Ross Anderson, November 5, 2018. "I was also pleased to discover that many UK charities have been taking on board the lessons of internationally respected academics like Dr. Russell James." https://fundraising.co.uk/2018/11/05/australian-legacy-fundraisers-learn-uk-counterparts/

Trusts & Estates. *The human side of estate planning: Part III*. by L. Paul Hood Jr., Sept 21, 2018. Also adapted Oct. 16 2018 at wealthmanagement.com as *Facing fear of death.*

The Independent. (UK Newspaper) *Do you have children? And if not, why not?* by Christine Manby, June 11, 2018.

SOFII.org. *Legacies, they're nowt to do with thee!* by Ashley Rowthorn, May 9, 2018. http://sofii.org/article/legacies-theyre-nowt-to-do-with-thee

The Chronicle of Philanthropy. *$9 trillion will transfer from American's estates, new analysis says.* By Heather Joslyn, April 17, 2018.

MarketWatch. *Want to be happier? Boost your savings* by Liz Weston, November 11, 2017. https://www.marketwatch.com/story/want-to-be-happier-boost-your-savings-2017-11-10

Business Insider. *Money might be able to buy happiness overall — especially when you're saving it* by Liz Weston. November 3, 2017. http://www.businessinsider.com/money-might-be-able-to-buy-happiness-especially-if-youre-saving-it-2017-11

U.S. News & World Reports. *Saving money makes you happier - Here's proof* by Liz Weston. October 23, 2017. https://www.usnews.com/news/business/articles/2017-10-23/liz-weston-saving-money-makes-you-happier-heres-proof

The Chronicle of Philanthropy. *Big planned gifts in offing as childless boomers age.* September 6, 2017, https://www.philanthropy.com/article/Nonprofits-See-Big/241075

The Economist. *The rise of childlessness* . July 27, 2017 "People without children are far more likely to bequeath money to charity, points out Russell James, an expert on philanthropy at Texas Tech University." https://www.economist.com/news/international/21725553-more-adults-are-not-having-children-much-less-worrying-it-appears-rise

Fundraising & Philanthropy Magazine. *Study shows getting into the will sooner benefits charities* by Kim Carter. June 26, 2017 http://www.fpmagazine.com.au/study-shows-getting-into-the-will-sooner-benefits-charities-350069/

State Street Global Advisors. *The philanthropy opportunity for advisors: A roundtable discussion* https://us.spdrs.com/docs-advisor-education/practice-management/client-engagement/The_Philanthropy_Opportunity_for_Advisors.pdf May, 2017

State Street Global Advisors. *Adding value with philanthropic planning: Best practices from the field* https://us.spdrs.com/docs-advisor-education/practice-management/client-engagement/Adding_Value_With_Philanthropic_Planning.pdf May, 2017

The NonProfit Times. *Bargain sale gifts might not be worth it* by Mark Hrywna. http://www.thenonprofittimes.com/news-articles/bargain-sale-gifts-might-not-worth/ March 14, 2017

Third Sector. *Fundraisers' job titles can affect likelihood of donors talking to them about donations, research indicates* by Susannah Birkwood. http://www.thirdsector.co.uk/fundraisers-job-titles-affect-likelihood-donors-talking-donations-research-indicates/fundraising/article/1413420 , October 25, 2016.

The Wall Street Journal. *Is longevity insurance too risky?* By Simon Constable. http://www.wsj.com/articles/is-longevity-insurance-too-risky-1477274761 , October 23, 2016.

Third Sector. *Legacy appeals featuring 'living donors' more likely to be successful, research finds* by Susannah Birkwood, http://www.thirdsector.co.uk/legacy-appeals-featuring-living-donors-likely-successful-research-finds/fundraising/article/1410145 September 27, 2016

The Fundraiser. *Legacy fundraisers: Is your job title letting you down* by Claire Routley. http://www.charitychoice.co.uk/the-fundraiser/legacy-fundraisers-is-your-job-title-letting-you-down/657, September 14, 2016

The Chronicle of Philanthropy. *Development no more: Fundraiser job titles change with the times* by Drew Lindsay, August 2, 2016

Financial Planning. *Estate planning errors: Assumptions advisors get wrong*. http://www.nasdaq.com/article/estate-planning-errors-assumptions-advisors-get-wrong-cm601799 , April 5, 2016

The Street.com. *How to leave a bequest to charity without hurting your family* by Eric Reed, March 18, 2016

Investopedia.com. *How to discuss philanthropy with financial advisory clients* by Zina Kumok. January 11, 2016

BYU Radio. *Top of the Mind with Julie Rose*. Live interview regarding research findings on bequest giving. August 25, 2015

Third Sector. *Using the phrase 'a gift in your will' gets best results for legacy fundraisers, says report* by Susannah Birkwood, http://www.thirdsector.co.uk/using-phrase-a-gift-will-gets-best-results-legacy-fundraisers-says-report/fundraising/article/1359939 August 21, 2015

Third Sector. *Reminders about tribute legacies increase donors' interest, research finds* by Susannah Birkwood, http://www.thirdsector.co.uk/reminders-tribute-legacies-increase-donors-interest-research-finds/fundraising/article/1359311 August 10, 2015

Research Magazine. *Retiring? It's time to move,* June 1, 2015

Consumer Reports Money Advisor. *6 costly estate-planning minefields, and how to avoid them*, March 2015.

Partnership for Philanthropic Planning: Perspectives. *Philanthropy as family: Words that work part 1 by Melissa Brown,* March 11, 2015.

The Times of Northwest Indiana [www.NWITimes.com]. *Make sure your bequest is actually giving by Maggi Spartz*, November 30, 2014

New York Times (blogs). *When philanthropy is weird, by Anna North*, September 5, 2014

Psychology Today.com. *(Interview) Making the ask: Techniques for getting a yes and for resisting unwanted solicitations, by Marty Nemko, July 16, 2014*

Wealth Management.com. *Engage your clients in legacy estate planning, May 11, 2014*

iMarketSmart.com. *Wills that won't (summary of Dr. James research), March 11, 2014*

My Generation Magazine. *Leaving assets to charity? Be precise, March 6, 2014*

The Planned Giving Blog. *Planned giving fortune telling – rates of childlessness, Jonathan Gudema, March 5, 2014*

The Planned Giving Blog. *Whatever happened to the Boston College/ Havens-Schervish wealth transfer predictions? Jonathan Gudema, March 3, 2014*

ThePlannedGivingBlogger. *My Top 7 Takeaways from Dr. James' New Research*, February 19, 2014

Healthcanal.com. *Refocusing* investor's attention away from stock market losses can reduce negative emotional responses by Fran Webber, February 12, 2014

AdvisorPerspectives.com. *A better way to measure risk tolerance,* by Joe Tomlinson, October 15, 2013

Interest.com. *An inheritance could turn around millions of financial lives,* by Brandon Duncombe, September 16, 2013

LearnVest. *How visualization can make you better with money,* by Cheryl Lock, July 11, 2013

Research Magazine. *Busting the risk myth of women and investing,* by Michael Finke, March, 2013

Nonprofit Radio. *(Guest) The bequesting brain*, November 30, 2012

Research Magazine. *This is your client's brain on finance,* by Michael Finke, November, 2012

Civil Society UK. *Legacy fundraising 'should focus on the donor, not the charity'* by Celina Ribeiro, June 29, 2012

U.S. News & World Report. *Why smart money chooses a Roth IRA: Smart investors are opting for Roth IRAs instead of traditional IRAs* by Emily Brandon, February 27, 2012 [Reprinted in Chicago Tribune, February 28, 2012].

CNN. *Charity on the campaign trail* by Charles Riley, February 7, 2012.

NBC News on MSNBC.com. *In race to be most generous, Romney leads* by Sevil Omer, January 26, 2012.

Bloomberg News. *Romney taxes: $7 million in donations over 2 years* by Julie Bykowicz and Steven Sloan, January 24, 2012; also appearing in the San Francisco Chronicle

Bloomberg News. *Gingrich's 2.6% in donations low for income* by Julie Bykowicz, January 20, 2012; also appearing in InvestmentNews.com

The Wall Street Journal's SmartMoney Magazine. *Can these people teach financial planning?* February, 2012, p. 66-71.

Fox34News KJTV. *Money matters: Studying the brain's role in financial decisions*, January 4, 2012, Lubbock, TX television station.
AARP The Magazine. *Test your money instincts* by Michaela Cavallaro, December, 2011, p. 21-23.
Financial Planning. *Helping clients be financially rational* by Donna Mitchell, October 25, 2011
The Wall Street Journal. *The quest for the right bequest* by Rachel Emma Silverman, October 1, 2011
New York Times. *Finance for tots* by Ron Lieber, April 15, 2011
ABCnews.com; USA Today.com. *Home ownership may be for the few, not the many* by Shelly K. Schwartz, March 20, 2011
Planned Giving Tomorrow. *Not as important as men: Nonprofits ignore women at their peril* by Michael Rosen, Spring/Summer 2011
National Journal. *Buy? Nah, rent. Nah, buy.* by Alina Tugend, March 16, 2011
CNBC.com. *Home ownership may be for the few, not the many* by Shelly K. Schwartz, March 14, 2011
CNBC.com. *Minority investors may offer huge potential for Wall Street* by Mark Koba, December 6, 2010
Pittsburgh Post-Gazette. *More older people are forced to turn to bankruptcy courts for relief: Retirees in debt* by Tim Grant, December 2, 2010,
Advancing Fundraising [Australia]. *What's new in research* by Kym Madden, November 1, 2010, p. 36
Charityvillage.com. *Surveying the legacy landscape: Why we're doing it and why we need you* by Natasha van Bentum, CFRE, November 1, 2010
USA Today. *Should you rent or buy your own home?* by Christine Dugas, October 8, 2010, p. 3 of Money section.
Redding Record Searchlight (Redding, California). *ID thieves mine social media* by David Benda, October 9, 2010.
Chicago Architect. *Designing for common good relies on common sense* by Lara Brown, July/August, 2010, p. 11-12.
Giving USA. *Educational attainment is a predictor of giving to educational organizations.* p. 103; *Watch for changes in Giving USA methods*. p.57; *Sources of contributions giving by bequest. p. 58*, 2009.
Stadt Zittau (Zittau, Germany daily newspaper). *Gastvortrag zur Finanzkrise heute an der Hochschule Zittau [Guest lecture on the financial crisis today at the university of Zittau],* no author listed, June 18, 2009, p. 17. Also carried in Sachsische Zeitung (Dresden, Germany daily newspaper). June 18, 2009.
Athens Banner-Herald. *Mortgage aids favor Georgians: Programs to stave off foreclosure* by Lee Shearer, April 6, 2009.
The Chronicle of Philanthropy. *New research sheds light on bequest giving* by Paula Wasley, April 1, 2009.
The Chronicle of Philanthropy. *Where Do Donors Turn for Advice on Giving?* by Holly Hall, March 31, 2009
The Chronicle of Philanthropy. *Making Fund-Raising Research More Useful and Accessible* by Holly Hall, March 30, 2009
Planned Giving Today. *Identifying and inspiring donors: What two studies teach us* by Michael J. Rosen, March 2009, 20(3), p. 1-2.
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Diari de Tarragona. *ENTREVISTA Russell N. James Profesorde la Universidad de Georgia, experto en hipotecas 'subprime' [INTERVIEW: Russell N. James Professor from the University of Georgia, expert in subprime mortgages]* by Rafael Servent, March 17, 2009, p. 19.
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