

Jesse B. Jurgenson, Ph.D., AFC®

Assistant Professor of Practice | Clinical Director | Undergraduate Program Director
School of Financial Planning | College of Health & Human Sciences | Texas Tech University
1301 Akron Avenue, HS 254, Box 41210
Lubbock, TX 79409-1210
jesse.jurgenson@ttu.edu | (806) 834-4299

Education and Credentials

Ph.D., Human Development & Family Studies, 2019, Iowa State University

Dissertation: Parental Financial Socialization and the Development of Financial Capability in Young Adults: A College Student Sample. Co-Chairs: Jonathan Fox, Ph.D. & Suzanne Bartholomae, Ph.D.

M.S., Personal Financial Planning, 2015, University of Missouri-Columbia

M.S., Human Development & Family Studies, Family Financial Planning emphasis, 2011, North Dakota State University

B.S., Criminal Justice Studies, 2007, University of North Dakota

Graduate Minor, College Teaching, University of Missouri-Columbia, 2015.

Graduate Certificate, Developmental & Family Sciences Advanced Research Design & Methods, 2019, Iowa State University

Accredited Financial Counselor® certification (#20060298), 2013

Academic Experience

Teaching, Research, and Outreach & Engagement

Assistant Professor of Practice, (2023-present), School of Financial Planning, College of Health & Human Sciences, Texas Tech University, Lubbock, TX.

Assistant Professor, (2020-2023), Department of Consumer Sciences, College of Human Environmental Sciences, University of Alabama, Tuscaloosa, AL.

Assistant Clinical Professor & Family Finance Extension Specialist, (2019-2020), School of Public Health, College of Agriculture & Natural Resources, University of Maryland, College Park, MD.

Administrative

Charles Schwab Foundation Personal Financial Planning Clinic Director, (2023-present), School of Financial Planning, College of Health & Human Sciences, Texas Tech University, Lubbock, TX.

Personal Financial Planning Undergraduate Program Director, (2024-present), School of Financial Planning, College of Health & Human Sciences, Texas Tech University, Lubbock, TX.

Internships & Fellowships

Graduate Program Assistant- Division of Consumer Education & Engagement, (2017-2018), Office of Financial Education, Consumer Financial Protection Bureau, Washington, DC.

Graduate Research Fellow, (2015-2017), National Endowment for Financial Education, Denver, CO.

Professional Financial Services Experience

Financial Counselor & Supervisor, (2007-2012), The Village Family Service Center, Fargo, ND.
Military Servicemember Personal Financial Consultant, (2014-2022), Zeiders, Woodbridge, VA.
Customer Service Representative, (2005-2006), Gate City Bank, Grand Forks, ND.

Teaching

Texas Tech University

Personal Financial Literacy

Undergraduate (PFI 2301) [4.50+/5.0 student evaluation rating in instructor effectiveness]

Financial Planning for Professionals

Undergraduate (PFP 2315)

Research & Philanthropic Fund Development: Grant Writing

Graduate (PFP 6330) [4.40/5.0 student evaluation rating in instructor effectiveness]

Communication and Counseling Techniques for Financial Planners (developed)

Undergraduate (PFP 3330)

University of Alabama

Psychology of Money

Undergraduate/Graduate

Introduction to Consumer Economics

Undergraduate

Introduction to Personal Financial Planning

Undergraduate

Research & Scholarship

Peer-Reviewed Journal Publications

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1. Bell, J., **Jurgenson, J. B.** & Warmath, D. (2024), (Online early publication). The Role of Objective Financial Situation and Psychological Outlook in the Relationship Between Personal Life Shocks and Financial Well-Being. *Journal of Consumer Behaviour*. <https://doi.org/10.1002/cb.2437>

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2. Nuckols, D., **Chawla, I.**, & **Jurgenson, J. B.** (2023). Self-efficacy of Personal Finance Professionals in Later Life Financial Well-Being: Evidence From a Virtual Professional Development Seminar. *Journal of Family & Consumer Sciences*, 115(2), 24-34. <https://doi.org/10.14307/JFCS115.2.24>

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3. Guillemette, M. A., **Jurgenson, J. B.**, Sharpe, D. L., & Zhang, X. (2020). Framing Longevity Income, *Journal of Personal Finance*, 19(1), 49-66.

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4. Bartholomae, S., Kiss, D. E., **Jurgenson, J. B.**, O'Neill, B., Worthy, S., & Kim, J. (2019) Framing the Human Capital Investment Decision: Examining Gender Bias in Student Loan Borrowing, *Journal of Family and Economic Issues*, 40(1), 132-145. doi: 10.1007/s10834-018-9603-6

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5. Hensley, B. J., **Jurgenson, J. B.**, & Ferris, L. A. (2017). Combining Adult Education and Professional Development Best Practice to Improve Financial Education Teacher Training, *Journal of Financial Counseling and Planning*, 28(1), 33-48. doi:10.1891/1052-3073.28.1.33

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6. Guillemette, M. A. & **Jurgenson, J. B.** (2017). The Impact of Financial Advice Certification on Investment Choices, *Journal of Financial Counseling and Planning*, 28(1), 129-139. doi:10.1891/1052-3073.28.1.129

*Shading denotes student author.

Awards & Recognitions

Richard L.D. Morse Applied Consumer Economics Award (ACCI),
The Impact of Parent Financial Socialization on Economic Well-being and Financial Decision-making
Over Time, 2020.

Iowa State University Graduate School Teaching Excellence Award, 2019.

CFP Board ACCI Financial Planning Best Paper Award
Framing Longevity Income, 2018.

Grants, External Funding, & Development Activities

Funded Activities

1. **Learning and Serving: A Student Pro Bono Financial Planning Curriculum Project**
Foundation for Financial Planning
Durband, D., Grabenstetter, S., Koochel, E., Jurgenson, J. B., & Guillemette, A., 2023-present,
\$35,000.
2. Texas Tech University College of Health and Human Sciences Travel Incentive Funding
Texas Tech College of Health and Human Sciences
Jesse B. Jurgenson, Ph.D., 2024, \$1,000.
3. **An Examination of the KMSI-R: Relationship to Financial Literacy and Cross-Racial Validity**
National Endowment for Financial Education (NEFE) Grants Program
Miranda Reiter, Ph.D., CFP®(P.I.), Jesse B. Jurgenson, Ph.D., Kimberly Watkins, Ph.D.,
Kenneth White, Ph.D., Megan McCoy, Ph.D., LMFT, 2021-present, \$111,417.
4. Echo360 Innovative Teaching Grant, EchoInnovation Inc., 2022, \$5,000.
5. Travel Assistance Program Grant, National Endowment for Financial Education, 2022, \$2,500.
6. S.E.C. Faculty Travel & Collaboration Program, University of Georgia, University of Alabama,
Southeastern Conference, 2020, \$1,400.

Selected Unfunded Activities

Breaking Barriers: Increasing Trust and Skill in Financial Services Usage for Young People of Color

National Endowment for Financial Education (NEFE) Grants Program
Megan McCoy, Ph.D., Jesse B. Jurgenson, Ph.D., Cara Macksound, Meredith Dean, 2022.

Recruit, Retain, and Train: Building a Stronger Profession Through the Financial Planning Pedagogy Research and Counseling Center

TD Ameritrade Institutional NextGen Grant
Kimberly Watkins, Ph.D. (P.I.), Jesse B. Jurgenson, Ph.D., & Madelaine L'Esperance, Ph.D., 2020.

Listen, Understand, and Create: Promoting Effective Financial Empowerment Resources for Community College Students through the Financial Empowerment Center at Prince George's Community College

CapitalOne & SunTrust Foundation
Jesse B. Jurgenson, Ph.D., 2020.

Selected Conference Presentations

Peer-reviewed Presentations

1. Reiter, M., **Jurgenson, J. B.**, McCoy, M., White, K., & Watkins, K., (May 2024). Financial Therapy Association Annual Conference, "Klontz Money Script-Inventory Revised (KMSI-R): Examining Measurement Invariance using a Diverse Sample," Financial Therapy Association, San Diego, CA.
2. **Jurgenson, J. B.** & Guillemette, A., (November 2023). Association for Financial Counseling and Planning Education Annual Research Symposium, "KEY: Financial Coaching Sessions with Focus on Reentry," Association for Financial Counseling and Planning Education, New Orleans, LA.
3. **Jurgenson, J. B.** (Panelist), (November 2023). National Endowment for Financial Education Board of Directors, "Developing the Future Research Funding Priorities of NEFE," National Endowment for Financial Education, Denver, CO.
4. Reiter, M., **Jurgenson, J. B.**, McCoy, M., White, K., & Watkins, K., (2023, May). An Examination of the KMSI-R: Relationship to Financial Literacy, Self-Efficacy, and Cross-Racial Validity. American Council on Consumer Interests (ACCI) Annual Conference, Las Vegas, NV.
5. Bell, J., **Jurgenson, J. B.**, & Warmath, D. (2022, November). Through the Head or the Wallet: The Psychological and Financial Effects of Life Shocks on Financial Well-being. Association for Financial Counseling and Planning Education (AFCPE®) Research & Training Symposium, Orlando, FL.
6. Bell, J., **Jurgenson, J. B.**, & Warmath, D. (2022, May). The Effects of Life Shocks, Material Hardship, and Supportive Intimate Relationships on the Assessment of Financial Well-being. American Council on Consumer Interests (ACCI) Annual Conference, Clearwater Beach, FL.
7. **Jurgenson, J. B.** & Kim, K.T. (2021, May) A Lasting Impression: The Connection Between Youth Financial Socialization and Financial Well-Being Across Multiple Generations. American Council on Consumer Interests (ACCI) Annual Conference, Las Vegas, NV.
8. Ketterman, J. M., **Jurgenson, J. B.**, Chawla, I., Kim, J. (2021, May). Later Life Financial Well-being: A Virtual Professional Development Training for Professionals. Poster presentation at the American Council on Consumer Interests (ACCI) Annual Conference.
9. **Jurgenson, J. B.** (2020, November) Showing and Telling: The Relationship Between Parent Financial Socialization and Young Adult Financial Behaviors Over Time. Association for Financial Counseling and Planning Education (AFCPE®) Research & Training Symposium, New Orleans, LA.
10. **Jurgenson, J. B.**, & Ketterman, J. M. (2020, November) Serving with Confidence: Increasing Financial Counselor and Educator Understanding of Later Life Financial Well-being Through Virtual Professional Development Training. Association for Financial Counseling and Planning Education (AFCPE®) Research & Training Symposium, New Orleans, LA.
11. Ketterman, J. M., Pippidis, M. R., Brown, V. L., Nuckols, D. M., McCoy, L. H., Terhune, C. A., & **Jurgenson, J. B.** (2020, November) Health Insurance in your Senior Years. Association for Financial Counseling and Planning Education (AFCPE®) Research & Training Symposium, New Orleans, LA.

12. **Jurgenson, J. B.**, (2020, May). The Impact of Parent Financial Socialization on Economic Well-being and Financial Decision-making Over Time. American Council on Consumer Interests (ACCI) Annual Conference, Arlington, VA. [Richard L.D. Morse Applied Consumer Economics Paper Award]
13. **Jurgenson, J. B.**, Kim, J., **Jasper, A. M.**, Russell, D. W., Cutrona, C. E., & Mont'Alvao, A. (2019, November). Longitudinal Effects of Economic Pressures on Depression in Unmarried African American Caregivers. Poster session at the Association for Financial Counseling and Planning Education (AFCPE®) Research & Training Symposium, Portland, OR.
14. **Jurgenson, J. B.**, Kim, J., **Jasper, A. M.**, Russell, D. W., Cutrona, C. E., & Mont'Alvao, A. (2019, May). Longitudinal Effects of Economic Pressures on Depression in Unmarried African American Caregivers. Presentation at the American Council on Consumer Interests (ACCI) Annual Conference, Arlington, VA.
15. Bartholomae, S., Fox, J. J., & **Jurgenson, J. B.** (2019, February) Consumer Skepticism and the Role of Financial Professionals. Presentation at the Doctoral Seminar through the Academic Research Colloquium for Financial Planning and Related Disciplines (CFP Board), Arlington, VA, Vickie Bajtelsmit, J.D., Ph.D. (Organizer).
16. Guillemette, M. A., **Jurgenson, J. B.**, Sharpe, D. L., & Zhang, X. (2018, May). Framing Longevity Income. Presentation at the American Council on Consumer Interests (ACCI) Annual Conference, Clearwater Beach, FL. [CFP Board Best Financial Planning Paper Award]
17. Guillemette, M. A., **Jurgenson, J. B.**, Sharpe, D. L., & Zhang, X. (2018, February). Framing Longevity Income. Presentation at the Academic Research Colloquium for Financial Planning and Related Disciplines (CFP Board), Arlington, VA.
18. **Jurgenson, J. B.**, & Bartholomae, S. (2017, June). Who Remembers and Benefits from Student Loan Entrance Counseling? A Multilevel Analysis. Presentation through the mini-institute Loan Entrance Counseling with Fox, J. J., Bartholomae, S., Letkiewicz, J., Montalto, C., Heckman, S., Lawson, D. & Anderson, S. at the Symposium on Collegiate Financial Wellbeing, Washington, D.C.
19. Creatively Addressing Financial Wellness: Research, Education, and Beyond. Panel participant at the Symposium on Collegiate Financial Wellbeing pre-symposium event (2017, June), Catherine P. Montalto, Ph.D. (Organizer), Washington, D.C.
20. Bartholomae, S., Fox, J. J., & **Jurgenson, J. B.** (2019, February) Consumer Skepticism and the Role of Financial Professionals. Poster session presentation at the Academic Research Colloquium for Financial Planning and Related Disciplines (CFP Board), Arlington, VA.
21. Consumer Financial Protection Bureau (CFPB) (Washington, D.C.), Office of Financial Education; Office of Students & Young Consumers, Perceptions and Impacts of Student Loan Entrance Counseling, 2017.
22. Hensley, B. J., & **Jurgenson, J. B.** (2016, November). Prepped for Success: A Study of Teacher Training, Financial Literacy, & Classroom Outcomes. Poster session presentation at the Association for Financial Counseling & Planning Education (AFCPE®) Research and Training Symposium, Louisville, KY.

23. Hensley, B. J., & **Jurgenson, J. B.** (2016, October). Prepped for Success: A Study of Teacher Training, Financial Literacy, & Classroom Outcomes. Poster session presentation at the Iowa State University Department of Human Development & Family Studies Research Symposium, Ames, IA.

Selected Outreach & Engagement

Media Interviews and Article Contributions

WalletHub	
Installment Loans	2024
Vehicle Insurance	2024
Financial Difficulties Paying for Housing	2024
Young Adult Credit Card Usage	2024
University of Texas Journalism Program	
Consumer Usage of Credit Report Boosting Products	2024
MarketWatch	
Changing Environment for Financial Planners and Advisors	2024
Financial Security of Older Adults	2024
Recovering from a Financial Shock	2023
KBLK-TV	
Reducing Credit Card Debt	2024
Podcast Guest	
Growing Money with Sean Trace	2024
LawFirm.com	
Consumer Bankruptcy	2023
Columbus Commercial Dispatch	
Utilizing Credit Unions	2022
The Crimson White	
Economic Benefits of Thrift Shopping	2022
WVUA 23 Digital	
Student Loan Forgiveness Programs	2022

Service

University Service, Texas Tech University

Texas Tech University Learning Management System Search Committee	2023-2024
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College Service, Texas Tech University

College of Health & Human Sciences Engaged College Program	
Co-Chair: Clinical Training Group	2024-present
College of Health & Human Sciences Curriculum Committee	2024-present

Department Service, School of Financial Planning, Texas Tech University

Faculty Search Committee	
Professor of Practice	2024-present
Professor of Practice – M.S. Program Director	2024-present
Professor of Practice – Center for Financial Responsibility Director	2024-present
Knowledge Empowering You (KEY)	
Faculty Advisor	2024-present
School of Financial Planning Annual Faculty Review Committee	2024-present

School of Financial Planning Executive Committee	2024-present
KEY Service Committee	2023-present
Accredited Financial Counselor® Exam Scholarship Committee	2023-present

University of Alabama

Instructional Effectiveness Committee	2020-2023
Consumer Sciences Undergraduate Pathways Committee	2021-2023

Selected External Service

American Council on Consumer Interests (ACCI) Board of Directors	2023-present
National Association of Personal Financial Advisors (NAPFA) Pro Bono Financial Planning Task Force	2023-present
Association for Financial Planning and Counseling Education (AFCPE) Accredited Financial Counselor® Examination Committee	2022-2023
Reviewer (Journal Articles, Conference Papers, Abstracts, and Grants) American Council on Consumer Interests Annual Conference Association for Financial Counseling and Planning Education Annual Conference Journal of Consumer Affairs Journal of Financial Counseling and Planning Journal of Financial Therapy Journal of Family and Economic Issues Family Relations Journal of Financial Services Marketing	Ongoing

Dissertation Committees

1. Ashley Keomo McWhorter, Texas Tech University, Committee Member
2. Joseph Johnson, Texas Tech University, Committee Member
3. Patrick Tito Buah-Bassuah, Texas Tech University, Committee Member

Professional Memberships

American Council on Consumer Interests	2013-present
Association for Financial Counseling and Planning Education	2013-present