Dr. Jared H. Pickens, CFP®

Versatile Teacher. Impactful Mentor. Strategic Advisor.

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EDUCATION

Doctorate in Higher Education Leadership
Texas A&M University Commerce, Commerce, Texas
Dissertation Title: *Selecting Successful Peer Financial Education Counselors*

Specialized Coursework
18 Graduate Hours in AACSB Approved Finance Courses
18 Graduate Hours in AACSB Approved Economics Courses

Masters of Science, Personal Financial Planning
Kansas State University, Manhattan, Kansas

Bachelors of Science, Personal Financial Planning
Texas Tech University, Lubbock, Texas

TEACHING EXPERIENCE

Associate Professor of Practice – PFP	Texas Tech University	2025 - Current
Assistant Professor – Economics	Texas A&M University - Commerce	2019 - 2024
Assistant Professor – Finance	Texas A&M University - Commerce	2015 - 2019
Senior Lecturer – Finance	University of Texas at Dallas	2012 - 2015
Adjunct Instructor – Finance	Texas A&M University – Commerce	2009 - 2011

UNIVERSITY SERVICE WORK

Faculty Advisor – Management & Econ Association	Texas A&M University - Commerce	Fall 2021
Director – Applied Economics	Texas A&M University - Commerce	Fall 2020
Interim Department Head – College of Innovation and Design	Texas A&M University - Commerce	Fall 2019
Faculty Advisor – Economics and Finance Society	Texas A&M University - Commerce	2016 - 2019
Member – University Hearing Board	Texas A&M University - Commerce	2016 - 2018
Program Director – Personal Financial Planning	Texas A&M University - Commerce	2015 - 2019
Advisor – Honors College Thesis Committee	Texas A&M University – Commerce	2015 - 2024
Founder / Director – Comet Cents Financial Literacy	University of Texas at Dallas	2014 - 2015
Member – Curriculum Committee	University of Texas at Dallas	2011 - 2015
Senator – Faculty Senate (elected twice)	University of Texas at Dallas	2013 - 2015
Faculty Representative – University Fee Committee	University of Texas at Dallas	2012 - 2014
Director – Undergraduate Finance Program	University of Texas at Dallas	2012 - 2015

TEACHING ASSIGNMENTS

Economics 2302 – Principles of Microeconomics	Texas A&M University - Commerce	2021- 2024
Economics 2301 – Principles of Macroeconomics	Texas A&M University - Commerce	2019 - 2024
Finance 534 – Advanced Risk, Insurance and Estate Plng.	Texas A&M University - Commerce	2017 - 2018
Finance 434 – Risk, Insurance, and Estate Planning	Texas A&M University - Commerce	2017 - 2018
Economics 1307 – The Economics of Personal Finance	Texas A&M University - Commerce	2015 - 2024
Finance 536 – Advanced Retirement Planning	Texas A&M University - Commerce	2015 - 2017
Finance 436 – Retirement Planning and Emp. Benefits	Texas A&M University - Commerce	2015 - 2017
Finance 530 – Fundamentals of Financial Planning	Texas A&M University – Commerce	2015 - 2018
Finance 430 – Principles of Financial Planning	Texas A&M University – Commerce	2015 - 2018
Finance 304 – Business Finance	Texas A&M University - Commerce	2015 - 2018
Finance 501 – Finance for Decision Makers	Texas A&M University - Commerce	2015 - 2018
Finance 385 – Insurance and Risk Management	Texas A&M University - Commerce	2015 Only
Finance 3100 – Professional Development	University of Texas at Dallas	2014 - 2015
Finance 6300 – Personal Financial Management	University of Texas at Dallas	2013 - 2015
Finance 3330 – Personal Financial Planning	University of Texas at Dallas	2011 - 2015
Finance 3320 – Business Finance	University of Texas at Dallas	2011 - 2015
Finance 304 – Business Finance	Texas A&M University – Commerce	2009 - 2011
Finance 497 – Introduction to Personal Finance	Texas A&M University – Commerce	2009 - 2011

UNDERGRADUATE RESEARCH AND THESIS ADVISING

Differences in Financial Literacy Among Texas College Students from Varying Socioeconomic Backgrounds	Dallas Millin	2021
Professional Identity Theory and CERTIFIED FINANCIANCIAL PLANNER™ PROFESSIONALS	Jaslyn Wacker	2019
Interactive Education in Teaching Students Delayed Gratification	Jaryn Wacker	2018
Economic Socialization through Children's Literature	Kate Maxwell	2015

AWARDS AND RECOGNITIONS

Engaged Faculty Award	Texas A&M University - Commerce	2017
Outstanding Service and Dedication Award	Texas A&M University - Commerce	2016
Outstanding Teaching Award	University of Texas at Dallas	2014
Chairman’s Award – DFW FPA	Financial Planning Association	2013
H.M. Lafferty Doctoral Scholarship	Texas A&M University - Commerce	2013
Dollars for Scholars Summer Scholarship	Texas A&M University - Commerce	2012
Outstanding Student in Personal Financial Planning	Texas Tech University	2006
Arthur N. Caple / NAGDCA Scholarship	NAGDCA / Texas Tech University	2005
Pennington and Bass Financial Planning Scholarship	P/B Associate / Texas Tech University	2005

FINANCIAL SERVICES EXPERIENCE

Investment Advisor/Retirement Counselor, Great West Financial, Austin, TX	2008 - 2010
Personal Financial Counselor, U.S. Department of Defense, Irving, TX	2008 - 2010
Financial Planning Coordinator, Lifeway Financial Corporation, Plano, TX	2007 - 2009
Financial Planning Intern, USAA Financial Planning Services, San Antonio, TX	2005
Insurance Specialist, Advanced Insurance Group, Lubbock, TX	2004 - 2006

LEADERSHIP & PROFESSIONAL ORGANIZATIONS

Co-Chair – THECB FLAC Committee	THECB	2016
DFW FPA–Scholarship Selection Committee	DFW FPA	2013
DFW FPA– Career Development Committee	DFW FPA	2009
DFW Financial Planning Association Member	DFW FPA	2006 - Current

ACADEMIC PUBLICATIONS

Cordell, D. M., Lauderdale, M. K., & Pickens, J. (2019). Financial Planning Insights from Research: Concepts Practitioners Can Use. *Journal of Financial Service Professionals*, 73(6).

Cordell, D. M., & Pickens, J. H. (2019). Rising Above the Minimum: Create Your CE Plan now. *Journal of Financial Planning*, 32 (8), 25-34

Dean, L. R., Harness, N. J., & Pickens, J. H. (2019). Examining asset flows and type of adviser compensation after an economic downturn. *Journal of Financial Planning*, 32(3), 48–56.

Cordell, D.M., & Pickens, J. H. (2019). Putting the Client First in Succession Planning. *Journal of Financial Planning*, 32(5), 32–34.

Humphreys, J. H., Hayek, M. J., Novicevic, M. M., Haden, S. S., & Pickens, J. H. (2019). The narrative cleansing of Andrew Carnegie: entrepreneurial generativity as identity capital. *Journal of Management History*, 25(2), 203–220.

Pickens, J. H. (2015). Selecting successful peer financial education counselor (Doctoral dissertation). Retrieved from *ProQuest Dissertations and Theses database*. (Diss. No.2636)

PUBLISHED NON JOURNAL ARTICLES

Pickens, J., & Yoon, J. (2012, February 9). Graduate school–Is it worth it? *The Mercury*, p. 3.
Pickens, J. (2011, December 12). The numbers…2011. *The Mercury*, p. 3.
Pickens, J., & Yoon, J. (2011, November 15). Banks and fees. *The Mercury*, p. 4.
Pickens, J., & Yoon, J. (2011, November 8). Money and health. *The Mercury*, p. 4.
Pickens, J. (2011, September 23). It could happen to you–ID theft. *The Mercury*, p. 3.
Pickens, J. (2011, September 11). Cash or credit. *The Mercury*, p. 3.
Pickens, J. (2011, October 24). Investments–Keeping it simple. *The Mercury*, p. 5.
Pickens, J. (2011, October 5). About student loans. *The Mercury*, p. 5.

Pickens, J. (2011, August 8). Introduction to personal finance. *The Mercury*, p. 2
Pickens, J. (2011, February 14). Student loans–How much is too much? *The East Texan*, p. 4.
Pickens, J. (2011, February 1). Cash is cool again. *The East Texan*, p. 4.
Pickens, J. (2010, February 14). Understanding credit reports. *The East Texan*, p. 4.

ACADEMIC PRESENTATIONS AND SPEAKING ENGAGEMENTS

Thinking Like an Everyday Economist, presented at Lion Lecture Series	2022
Best Practices in Social Media and Marketing of Financial Planning Degree Programs, Texas Tech University, Lubbock, Texas	2016
Navigating the Legal Landscape, presented to Fidelity, Westlake Campus, Westlake, Texas	2016
Financial Planning for New Attorneys, presented to Dallas Bar Association, Belo Mansion, Dallas, Texas	2015
Social Media and Finance, presented to Fidelity, Westlake Campus, Westlake, Texas	2015
Selecting Successful Financial Education Counselors, presented to Texas Association of Collegiate Financial Education Professionals, Texas A&M University-College Station	2014
The True Cost of Our Financial Decisions, presented during UT Dallas Scholar's Day	2013
Are Americans Financially Insane?, presented during UT Dallas Scholar's Day	2013

ACADEMIC PROGRAM LEADERSHIP AND DEVELOPMENT

Director, M.S. Personal Financial Planning **Texas Tech University (2025 – Current)**	• Recruit, retain, advise, and mentor students. • Lead efforts for semester planning/scheduling • Review and conduct course and program level evaluations and assessments • Foster program growth and sustainability. • Participate in outreach and engagement activities in the community and profession. • Facilitate accreditation of the program with the CFP Board and AFCPE. • Engage with industry and professional partners to facilitate student and program success.
Director, Applied Economics **Texas A&M University – Commerce (2021-2024)**	• Conducted market study to determine need for a new economics degree program. • Authored the degree application for the new program and received approval from the THECB. • Responsible for recruiting, advising, and leading team to help students achieve their full potential.
Interim Department Head – College of Innovation and Design **Texas A&M University – Commerce (Fall 2019)**	• Managed 15 different faculty members, two advisors, and one administrative assistant • Scheduled course rotations and assigned faculty for teaching assignments for three different undergraduate degree programs • Managed a variety of escalated academic issues • Hired additional faculty to meet student demand • Responsible for evaluations for faculty

Director of Personal Financial Planning **Texas A&M University – Commerce (2015-2018)**	• Registered undergraduate and graduate degree program with the CFP® Board of Standards, Inc. • Taught courses in program • Organized annual conference for students and professionals • Recruited, advised, and mentored students
Director of Comet Cents Financial Success Program **UT Dallas (2014 – 2015)**	• Raised over $90,000 in grant funding to start financial literacy program. Hired student coordinator and 10 interns/volunteers; trained all individuals. • Provided direction for program that reached over 1,000 UT Dallas students in its inaugural year. • Helped lead a team that provided financial literacy awareness and research.
Director of Undergraduate Finance Programs **UT Dallas (2012 – 2015)**	• Led Texas' second largest undergraduate finance program with more than 700 students; ranked in the nation's top 50 finance programs by Bloomberg's BusinessWeek. • Responsible for AACSB and SACSOC assessment • Coached, trained, and accompanied students in national and global competitions in finance. • Responsible for curriculum design, implementation, and adjustments for five financial tracks, including Personal Financial Planning, Corporate Finance, Investment Analyst, Real Estate, and Financial Information Management
Director – Top Performer Competition **UT Dallas (2012 – 2014)**	• Created, implemented, and maintained a virtual investment and personal finance camp for 3 years. Served over 500 high school students across the United States • Managed a $30,000 budget and negotiated contracts for stock market simulation software. • Recruited and taught students the basics of investing and personal finance concepts. • Program recognized in local and national media and cited as being instrumental in encouraging students to major in a business-related field.

MEDIA APPEARANCES

Curry, K. (2015, October 11). How to find a financial planner to fit you. *Dallas Morning News.* Retrieved from http://www.dallasnews.com/business/personal-finance/headlines/20151006-finding-a-financial-planner-to-fit-you.ece

Williams, G. (2015, June 30). 5 tips for newlyweds merging bank accounts. *US News and World Report.* Retrieved from http://money.usnews.com/money/personal-finance/articles/2015/06/30/5-tips-for-newlyweds-merging-bank-accounts

Imherr, K. (2014, September 11). Comet Cents helps students master money. *UT Dallas News Center*. Retrieved from http://www.utdallas.edu/news/2014/9/11-31184_Comet-Cents-Helps-Students-Master-Money
_story-sidebar.html

Coast, C. (2014, November 28). UTD receives grant for finance program. *Dallas Morning News.* Retrieved from http://www.dallasnews.com/news/community-news/richardson-lake-highlands/chris-coats/20141128-utd-receives-grant-for-finance-program.ece

Arnold, L. (2013, April 12). Financial literacy at the state level: Texas. *Card Hub.* Retrieved from http://www.cardhub.com/edu/financial-literacy-in-texas/

Horner, K. (2013, April 26). Financial expert urges wedding season's newlyweds to avoid debt. *UT Dallas News Center*. Retrieved from http://www.utdallas.edu/news/2013/4/26-23411_Financial-Expert-Urges-Wedding-Seasons-Newlyweds-t_article-wide.html

Conrad, B. (2013, August 8). Stocking up for the school year: retailers expect to see large turnout on tax-free weekend. *Plano Star Courier.* Retrieved from http://starlocalmedia.com/planocourier/news/stocking-up-for-the-school-year-retailers-expect-to-see/article_162d54e4-31fb-5a8a-bc4d-041c535ae732.html

Morales, K. (2013, September 10). UT Dallas graduates among those with the least student debt in the country. *UT Dallas News Center*. Retrieved from http://www.utdallas.edu/news/2013/9/10-26211_UT-Dallas-Graduates-Among-Those-with-the-Least-Stu-_story-sidebar.html

O'Connell, B. (2013, October 23). Student trap: So much loan debt companies won't hire you. *The Street.* Retrieved from http://www.thestreet.com/story/12076860/1/student-trap-so-much-loan-debt-companies-wont-hire-you.html

O'Connell, B. (2013, October 23). The real formula for how much student loan debt you can handle. *Main Street Debt*. Retrieved from http://www.mainstreet.com/article/real-formula-how-much-student-loan-debt-you-can-handle

Bounds, J. (2012, February 17). Allegiance capital corp. to double revenue in 2012. *Dallas Business Journal*. Retrieved from http://www.bizjournals.com/dallas/print-edition/2012/02/17/allegiance-to-double-revenue-in-2012.html?page=2

Yip, P. (2012 June, 18). Christus plans Friday job fair. *Dallas Morning News*. Retrieved from http://bizbeatblog.dallasnews.com/author/pyip/page/20/

Morales, K. (2012, December 12). Finance expert's tips can keep holiday spending in check. *UT Dallas News Center*. Retrieved from http://www.utdallas.edu/news/2012/12/12-21231_Finance-Experts-Tips-Can-Keep-Holiday-Spending-in-_article-wide.html

Fischer, K. (2011, May 17). UTD talks stocks with high schoolers: Kids learning finances for the future. *NBC Education News*. Retrieved from http://www.nbcdfw.com/news/local/UTD-Talks-Stocks-With-High-Schoolers-122006874.html

Glass, J. (2011, September 23). Teen in contest rides wild market to 43% gain. *UT Dallas News Center*. Retrieved from http://www.utdallas.edu/news/2011/9/23-12911_Teen-in-Contest-Rides-Wild-Market-to-43-Gain_article.html

Slinkard, C. (2010, June 21). Personal finance class to debut this fall. *The East Texan.* Retrieved from http://www.theeasttexan.com/news/view.php/578821/Personal-finance-class-to-debut-this-fal