Deena B. Katz, CFP®
Vitae 2013 Academic

EDUCATIONAL BACKGOUND

- Doctor of Humane Letters (LHD) Adrian College, April, 2001
- Bachelor of Arts, Adrian College, 1974
- Coursework, University of Illinois, 1968-1969

CERTIFICATIONS AND ADDITIONAL ACADEMIC PREPARATION

- College for Financial Planning, Denver Colorado
  - Certified Financial Planner (CFP®) #13960, 1987
- Wealth Management, University of Chicago, 2001-2003
- World Bank Institute, 1989

PROFESSIONAL EXPERIENCE

- Chairman and Owner Partner, Evensky & Katz, 1989-present
  - Built and grew a prestigious multimillion dollar fee-only financial planning and investment advisory group with national and international presence
  - Hired, trained, managed and supervised a staff of 18, including 9 professional staff and 9 operational staff
  - Created a college and high school internship integration program unique to our practice for experience and career path opportunities
  - Created proprietary educational training for staff, including two-day retreats and ongoing continuing education programs
- President and Owner, Financial Planning Network, 1984-1989
- Controller & Vice President, Katz Realty, 1976 -1984

CONSULTING EXPERIENCE

- Consultant- University of Akron- development of CFP® Academic Program
- Consultant, American Institute of Certified Public Accountants (AICPA,) PFP Division 2007- present
- Developed and delivered American Institute of Certified Public Accountants Personal Financial Professional Pathway Exam and Case Study- 2007-present
- Consultant- MoneyGuide Pro financial planning software 1998-present
- Director, Moss Adams Advisory Services- Business Consulting Group, April 2004-2006
  - Consulted nationally with financial planning and investment advisory practices as well as major national corporations, such as Fidelity Investments and Pershing (Bank of New York)

  - Designed and developed national training and educational programs for groups such as AIG Advisors and Waterhouse (now TD Ameritrade)
  - Creator and faculty for Business Solutions Workshops, FPA, 2006

ACADEMIC EXPERIENCE

- American College, Adjunct Graduate Professor 2007-2009
- Texas Tech University, Associate Professor, 2006-present
  - Teach Business & Entrepreneurship for PFP
  - Teach the PhD Qualifying Exam Boot Camp
  - Teach the Capstone classes at undergraduate and graduate level
  - Teach the Advanced Technology classes at graduate and undergraduate level
  - Teach the Professional Practices classes at the graduate and undergraduate levels as a segue and pre-requisite for student summer internship experiences
  - Teach the introductory financial planning undergraduate and graduate-level classes
  - Teach the Executive MBA /MS PFP intro to financial planning classes
  - Teach the Field Classes for personal financial planning
  - Develop and teach the PFP Practicum for financial planning operations and support
  - Dissertation Committees 2007-present
- Texas Tech University, Internship Supervisor, 2006- present
  - Assist 50-65 students per year in obtaining internship positions at various financial institutions, locally and nationally. Supervise their 300 hour required internships, including working with their internship sponsors. Mentor and advise students.
- Financial Planning Association Virtual Workshops, 2002-present
- AICPA Virtual Workshops 2007-present
- Online educational programs on various financial planning subjects, including practice management techniques
- University of Miami Law School, Financial Planning course, 1990
- Teacher, Idaho Falls, Idaho Public School System, 1974-1975
- Teacher, Madison Township, Michigan Public School System, 1973-1974

PROFESSIONAL SERVICE AND LEADERSHIP

Professional Memberships

  - Financial Planning Association, National Board of Directors – past
  - Financial Planning Association 1984- Present
  - International Association for Financial Planning (now FPA), Past Chair – Chicago Chapter, 1988-1989

- Institute of Certified Financial Planners (now FPA), Past Board Member, Chicago and Miami 1987-1989
- Florida Bar- Elder Law Section Member

International Boards and Committees

- Asian Journal of Financial Planning Editorial Board, 1998- present

National Boards and Committees

- Advisors Ahead, National Advisory Board 2012-Present
- FPSB Integrated Financial Planning Module Group 2010
- Financial Planning Association- National Board Member 2007-2010
    - FPA Chair, Career Development Committee, 2009
    - FPA Global Advisory Council 2007-present
    - FPA Finance Committee 2009-present
    - FPA Chapter Leadership Council- National Board Liaison 2009-present
    - FPA Diversity Task Force 2008-present
- Foundation for Financial Planning Board of Trustees, 2007- 08
- InFRE Board of Directors – 2007-current
- *Journal of Financial Planning*, Frontier Awards Committee 2007-08
- *Journal of Financial Counseling and Planning*, Reviewer 2008
- Special Advisory Board to the Texas Comptroller, 2007-present
- *Investment Advisor* – Advisory Council, 2006- 2008
- State Farm Chair Search Committee, American College, 2008
- Editorial Board, *AICPA Planner*, 2005-Present
- Editorial Board, *Journal of Retirement Planning*, 2000- 2007
- Trustee, Adrian College- Board of Trustees, 1996-2005
- Editor- in Chief, *Journal of Retirement Planning*, 2000-2002
- National Endowment for Financial Education – Think Tank on Retirement, 1998
- CFP Board Exam Audit Committee, 1998
- CFP Board – Item Writing Workshop, 1998
- Schwab Institutional Task Force, 1998
- IAFP (now FPA) Strategic Taskforce, 1997
- CFP Board Long Term Care Taskforce Chair, 1997
- National Endowment for Financial Education- Think Tank on Long Term Care, 1996
- Long Term Care- Industry Taskforce, 1996
- CFP Board Pass Score Committee, 1996
- Coral Gables Community Foundation- Past Vice Chair, 1993
- Founding Member of the Alpha Group- Industry Think Tank, 1990
- Chicago Rotary Club, 1986-1992
- Chicago Rotary Club Board of Directors, 1988-90

AWARDS AND RECOGNITION

- *Investment Advisor Magazine*- Thirty for Thirty- recognized as one of the thirty individuals who have been most influential in building the financial planning profession over the past thirty years 2010
- *Investment Advisor Magazine's* 25 Most Influential People in the Financial Planning Industry, May 2003, 2004, 2006, 2007, 2008, 2009
- "The One Thing…" *Financial Advisory Industry's Top Coaches, Consultants and Industry Insiders*, 2005
- *Medical Economics* 150 Best Financial Advisers for Doctors, 2001-2003
- *Accounting Today*, Top Ten Names to Know in Financial Planning, 2001
- *Financial Planning Magazine's* Most Influential People (1of 5) in the Planning Profession, 2001, Awarded again (only second time awardee ever) in 2008
- *Accounting Today* Top Influential People, 1999, 2000, 2002, 2003
- *Accounting Today* Top 100 Most Influential People, 1998
- *Mutual Funds Magazine* Top Planners Award, 2001-2002
- *Worth Magazine's* Best Financial Advisers, 1996, 1997, 2001, 2002
- *Worth Magazine's* Top 60 Financial Planners, 1994
- AICPA- Planner's Award in Excellence, 1993
- Adrian College Young Alumni Achievement Award, 1993

PFP PROGRAM DEVELOPMENT PROJECTS

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- **Development of the UBS Outsourcing Plan Development Practicum 2012-Present**
- **Development of Business Succession Program and Entrepreneurship Class** – 2011 integration with advisors and PFP students to provide real-life experiences and succession opportunities.
- **Development of the PFP Alumni Advisory Board 2011**
    - First PFP Distinguished Alumni Award- Christopher Zook 2011
    - Fundraising Efforts for PFP Projects $25,000
- **Development of Special Topics Course-** A two-day, 15 hour course with highly respected and well-known experts in specialized fields. 2008- current
    - 2013 – Special Topic Speakers
        - Gary Davis- Compliance
    - 2012- Special Topic Speakers
        - Ben Baldwin- insurance
    - 2011 Special Topic Speakers
        - Geoff Davey, President FinaMetrica- Risk Assessments
        - Patti Houlihan, When the Phone Rings

- 2010 Special Topics Speakers
  - Richard Wagner- Future of Planning
  - Martin Siesta- Circle Training
  - Matt Lynch, President Capital Analysts, Product Understanding and Pricing
- 2009 Special Topic Speakers
  - Michael Kitces- Understanding Withdrawal Rates in Retirement
  - Michael Grossman- Inside a Fee-Only Wealth Management Firm
  - Hugh Massey- Life Purpose Training
  - Saundra Davis- Financial Planning for Low and Moderate Income Clients
- 2008 Special Topic Speakers
  - Linda and Norm Boone (authors) Developing and Investment Policy
  - Hugh Massey (developer of Financial DNA) Life Purpose Training
  - Roger Gibson – (author) Asset Allocation
  - Susan Bradley (author) Sudden Money

- **Developed new Advanced Technology Curriculum**- Using in-kind gifts in excess of $4 million and cooperation from vendors, developed a Certification Program for students in various financial planning and investment technology software.
- **Developed PFP Partners-** The PFP Partners symbolizes students in partnership bonding with their major course of study and the profession. Students volunteer 10 hours per week on marketing, public relations, speaker and visitor hosts and other responsibilities related to the PFP program.
- **Developed Opportunity Days-** Beginning with 2007 and the 20/20 Celebration (TTU was one of the first twenty programs granted the CFP registration twenty years ago,) developed the annual three-day event program to focus on students, alumni and hiring firms. Composed of an etiquette dinner, a career day and a banquet dinner with special speakers, Opportunity Days brings top hiring firms and students together to facilitate hiring and internship opportunities. Speakers and special guests have included:
  - 2007- Don Philips, Director of Morningstar; Denby Brandon, Oliver Welch, FPA Historians, Evan Simonoff, Publisher of *Financial Advisor Magazine*
  - 2008- Bob Veres- *Insights,* Tom Bradley, President, TD Ameritrade
  - 2009- Bernie Clark, National Sales Director, Schwab Corporation
  - 2010- Kent Hance, Chancellor, Texas Tech University
- **Developed Special Guest Speaker Program-** Brought prominent guest speakers to TTU Campus, such as Bill Reichenstein, Professor and author from Baylor University, Bob Curtis, President of Money Guide Pro, Tim Kochis, Managing Partner of Kochis Fitz (now Quintile,) among others
- **Developed Certification Program- AICPA/PFP-** Along with selected Texas Tech Personal Financial Planning faculty, developed curriculum guide, exam and case study

for American Institute of Certified Public Accountants, Personal Financial Planning designation. In the future, the PFP Division will be responsible for this credentialing, along with the AICPA-PFP Committee.

- **Business Development-**
  - Schwab Institutional and/or Foundation-
    - $250,000 grant for computer lab upgrade over 3 years
    - $1,000,000 for Technology Complex and Research Scholar
    - 50 registrations to annual conference $55,000
    - 2 Schwab liaison students $10,000
    - 3 day Portfolio Center learning seminar $20,000
    - 60 seats for Portfolio Center $250,000 annually
    - Free exhibit space $20,000 (2 years)
  - TD Ameritrade
    - 12 all-expenses paid for their annual conference for 10 students and 2 faculty $35,000
    - iRebal software $40,000 annually
    - Advisor Direct software $150,000 annually
  - Edward Jones scholarship program $100,000
  - Old Mutual $3000
  - Tools, Techniques in Technology Conference- $1500 toward student registration
  - Morningstar Research Software: $1,200,000 annually
  - MoneyGuide Pro software: $60,000 annually
  - Junxure software: $70,000 annually
  - Red Tail software: $4,000 annually
  - EISI NaviPlan software: $180,000 annually
  - MoneyTree software: $60,000 annually
  - Protracker software: $60,000 annually
  - LaserFische software; $50,000 annually
  - Trumpet software: $25,000 annually
  - IPS Advisor Pro: $30,0000 annually
  - dbCAMS- Morningstar: $300,000 initial; then $120,000 annually
  - TTU-PFP Alumni Campaign started in December of 2008.

RESEARCH

- "Addressing the Anticipated Shortage of Financial Planning Professionals: A University Based Solution**,"** Katz, Deena B. and Loving, Ajamu, 2006 (Abstract)
- "The Conceptual Planning of a Physical Environment for Personal Financial Planning," Collier, Don; Katz, Deena and Durband, Dottie, 2007 Presented at Academy of Financial Services, August 2007

- "The Competencies Needed for Entry Level Financial Planning Positions," Evensky, Harold; Hampton, Vickie; Salter, John, Katz, Deena; Winchester, Danielle; and the Center for Financial Responsibility at Texas Tech University, 2007

PUBLICATIONS

Books

Katz, Deena *The Complete Guide to Practice Management*, January 2009
Evensky, Harold and Katz, Deena, Editors, *Retirement Income Redesigned Bloomberg, 2006.*
Evensky, Harold and Katz, Deena, Editors, *Investment Think Tank, Bloomberg, 2004.*
Katz, Deena, *Deena Katz's Tools and Templates for Financial Advisers*, Bloomberg, 2001.
Katz, Deena, *Deena Katz on Practice Management***,** Bloomberg Press, 1999.
Katz, Deena, *Taking Charge of Your Retirement***,** Lee Simmons Associates, 1997.
Katz, Deena, *Long Term Care: Needs, Costs & Financing, "Other Sources of Financing"***,** *Health Insurance Association of America*, 1996.
Katz, Deena, *Planning for Long Term Care Needs***,** Lee Simmons Associates, 1997.
Katz, Deena, *Planning Long-Term Health Care***,** Houghton Mifflin, 1990, reprinted annually 1991-1996.

Journal Articles

Katz, Deena B., various articles 2000-2001, *Journal of Retirement Planning.*
Katz, Deena B., It's the Doctor, Not the System, *Asia Financial Planning Journal,* 28-29, 2004.
Katz, Deena B., Stand Out from the Pack, *Asia Financial Planning Journal, 40-41, 2003.*
Katz, Deena B., Client Qualification Tools and the First Interview, *Asia Financial Planning Journal*, 30-31, 2003.

Professional Articles

Katz, Deena, Great Expectations? Think British. New Rules to Apply there in 2013, *Financial Planning Magazine*, December, 2012
Katz, Deena Less Risky Business: Protecting Your Financial Planning Firm from Fraud, *Financial Planning Magazine*, October, 2012
Katz, Deena, Final Decision: Check your Living Wills and Health Care Documents, *Financial Planning Magazine*, August, 2012
Katz, Deena, The Right Experience, *Financial Planning Magazine,* April, 2012
Katz, Deena, Giving It Away, *Financial Planning Magazine*, February, 2012
Katz, Deena, Replacing Yourself, *Financial Planning Magazine*, December 2011

Katz, Deena, Mission Control, *Financial Planning Magazine*, October, 2011
Katz, Deena, Summer Repair Project, *Financial Planning Magazine*, August, 2011
Katz, Deena, Larry, Will You Take Me Back? *Financial Planning Magazine*, June, 2011
Katz, Deena, Keep Calm and Carry On, *Financial Planning Magazine*, April, 2011
Katz, Deena, RVU Thinking, *Financial Planning Magazine*, February, 2011
Katz, Deena, Dear Client, *Financial Planning Magazine*, December, 2010
Katz, Deena, What Clients Value, *Financial Planning Magazine*, October, 2010
Katz, Deena, Enjoy the Ride, *Financial Planning Magazine*, August, 2010
Katz, Deena, Last Gen to Next Gen, *Financial Planning Magazine*, June, 2010
Katz, Deena, Set Up for Succession, *Financial Planning Magazine*, April, 2010
Katz, Deena, Our Cosmic Glue, *Financial Planning Magazine*, February, 2010
Katz, Deena, Can We Talk, *Financial Planning Magazine*, December, 2009
Katz, Deena, Measure What Matters, *Financial Planning Magazine*, October, 2009
Katz, Deena, Cosby, Plato and You, *Financial Planning Magazine*, August, 2009
Katz, Deena, Invest in People, *Financial Planning Magazine*, June, 2009
Katz, Deena, Take Care O' You, *Financial Planning Magazine*, April, 2009
Katz, Deena, Icing on the Cake, *Financial Planning Magazine*, February, 2009
Katz, Deena, Financial Imagineers, *Financial Planning Magazine*, December, 2008
Katz, Deena, Reining In Email, *Financial Planning Magazine*, October, 2008
Katz, Deena, Forget Hiring, Start Onboarding, *Financial Planning Magazine*, August, 2008
Katz, Deena, True Value, *Financial Planning Magazine*, June, 2008
Katz, Deena, Consistency Is Key, *Financial Planning Magazine*, April, 2008
Katz, Deena, Riding it Out, *Financial Planning Magazine*, February, 2008
Katz, Deena, A Partnership in Productive Aging, *Financial Advisor Magazine*, April 2006.
Katz, Deena, Boomers: Retire, Restructure or Reinvent, *Financial Advisor Magazine*, April 2005.
Katz, Deena and Evensky, Harold, Investment Performance vs. Wealth Management, *Financial Advisor Magazine*, March 2005.
Katz, Deena, Lessons from a Bear Market, *Financial Advisor Magazine*, July 2002.
Katz, Deena, What's for Dinner? *Financial Advisor Magazine*, September, 2005.
Katz, Deena, *Investment Advisor*- various articles 1998-2000.
Katz, Deena, Women in Transition Form Natural Market for Planning, *National Underwriter*, 1996.
Katz, Deena, Needed: Paranoia about Privacy, *Financial Advisor Magazine*, November 2001.
Katz, Deena, Creating Pre-Client Loyalty, *Investment Management Consultants Association, (IMCA) Monitor*, May, 2004.
Katz, Deena, Planning for Long Term Care, *AICPA PFP Division Planner*, 1993.
Katz, Deena, *Chief Executive*, 1990.
Katz, Deena, Various articles, *Financial Planning Magazine*, 2000-2001.
Katz, Deena, Various articles, *Loose Change Newsletter*, 1991.
Katz, Deena, various articles, *Personal Financial Planning.*

Electronically Published

Katz, Deena, Management Succession Alternatives, *Practice Lifecycle*, www.practicelifecycle.com, 2007

Katz, Deena, Perfect Timing, *Practice Lifecycle*, www.practicelifecycle.com , 2007

Katz, Deena, Cost, Capacity and Growth with Purpose, *Practice Lifecycle*, www.practicelifecycle.com, 2006.

Katz, Deena. Just the Ones You Want to Keep, *Practice Lifecycle*, www.practicelifecycle.com, 2006.

Katz, Deena, Using Third Party Surveys, *Practice Lifecycle*, www.practicelifecycle.com, 2006.

Professional Publications- Columnist

Financial Planning Magazine, *Profitable Practice* 2008- current
Financial Advisor Magazine, *Wealth Management*, 2004-2007
Practice Lifecycle, *On Practice Management*, 2006-2008

SPEAKING ENGAGEMENTS

- Asian Journal of Financial Planning Conference
- AIG – Sales to Solutions Fee Transition Courses
- AIG- Collaborative Coach Program
- AFS – Academy of Financial Services- Present Paper 2007
- AJFP, Singapore Consumer Expo
- AICPA Conference, New Orleans, Louisiana
- AICPA Boston Conference
- AICPA 2009 PFP Conference, San Diego
- AICPA 2001 Investment Planning Conference
- AICPA Lubbock 2008
- AICPA Networking Group -2008
- Alliance Bernstein- Practice Made Perfect Seminars
- ALMACA- EAP (Employee Assistance Professionals)
- American Association of Individual Investors
- American Institute of Certified Public Accountants
- AT & T Early Retirement Programs
- Baptist Hospital- Miami
- Berger Funds, Focus Conference
- Bloomberg Wealth Management – Future Program
- Capital Analysts Circle of Excellence

- Celebrating Life Series- New Delhi and Mumbai, India
- CFP Conference – Singapore
- CFP Program Directors National Conference
- Coral Gables Board of Realtors
- California CPA Education Foundation
- Canadian Association of CFPs- Calgary
- Columbia Funds
- Drug Enforcement Agency- Miami
- FICPA Personal Financial Planning Conference
- Fidelity Best Practices Series
- Financial Advisor Magazine– Retirement Conference
- Financial Advisor Magazine- Investment Symposium
- First Trust Portfolios – Seminar Series
- FPA Austin Career Day
- FPA of Australia Annual Convention, Sydney, Australia
- FPA Atlanta Regional Conference
- FPI Annual Convention, Cape Town, South Africa
- FPA Business Solutions – Dallas
- FPA Business Solutions- Boston
- FPA Northern California Regional Conference
- FPA- Central Florida Regional
- FPA- Central Ohio Regional
- FPA – Charlotte, NC
- FPA- Dade Chapter
- FPA- DFW Symposium
- FPA DFW – Career Day
- FPA- Emerald Coast
- FPA- Houston
- FPA- Illinois Symposium
- FPA of Malaysia
- FPA Michigan Regional Conference
- FPA Northern California Conference
- FPA North East Ohio Symposium
- FPA Oregon Regional Conference
- FPA Philadelphia Symposium
- FPA Success Forum – Various years
- FPIA National Convention- New Zealand
- KPFA- Korean Financial Planning Association Annual Conference, Seoul

- IAFP Conference for Advanced Planning
- IAFP National Conference, Salt Lake City, Utah
- IAFP Success Forum, San Antonio, Texas
- IFP Conference- Robinson College, Cambridge University, England
- Investment Management Consultants Association
- Impact- Schwab Conference, Orlando, Florida
- Independent Advisors Conference – Sydney, Australia
- India Wealth Management Symposium
- Institute of Certified Financial Planners
- International Association for Financial Planners, Falls Church, Virginia
- International Financial Planning Conference, Kuala Lumpur, Malaysia
- International Council, Kyoto, Japan
- Intershow/Dow Jones Investment Advisor Conference,
- Investec Annual Financial Planners Convention & Exhibition, Johannesburg, South Africa
- Investec IMS Conference, Dublin, Ireland
- Jewish Federation- Florida
- JP Morgan Wealth Management Symposium, New York
- Land O' Frost Company
- Lydian Wealth Management- Washington DC
- Money & More Investment Seminar- Atlanta Constitution, Atlanta, Georgia
- Money Show Chicago, Las Vegas
- Money Program- New Orleans Times-Picayune
- Morningstar Advisor – Cruise
- Mutual Service Corp
- NAPFA, Tools and Techniques Conference
- NAPFA National Conference 2009
- National Academy of Elder law Attorneys
- National Association of Women's Life Underwriters
- National Endowment for Financial Education- National Convention
- NEFE Think Tank, Tucson, Arizona
- Nightly Business Report- Fiscal Fitness Weekends
- North Shore Hospital- Miami
- Oklahoma Society of CPA's
- Oklahoma State Chamber of Commerce
- Osher Life Center- Retirement Rocks
- PacWest Securities
- Pershing, LLC- Business Building Seminars
- Principal Life Insurance Company

- Puget Sound , FPA Regional
- Raymond James- Women's Symposium
- Rotary Club of Chicago
- Rydex Advisory Council
- Scott & Stringfellow Securities
- Society of Financial Service Professionals – Annual Convention
- Southern Bell Early Retirement Programs
- TD Waterhouse Institutional National Conference
- TD Waterhouse *Road to Independence* Training Programs
- Texas Tech University- Family Financial Planning Department
- Transamerica Top Advisers
- Thornburg Funds- Wealth Management Conference
- TTAAWHE
- University of Miami- Law School
- Valmark Securities, Inc.
- UBS Hanover Forum
- UBS Pacesetter and UBS Foundations Conferences
- United Planners Annual Meeting- Phoenix
- US Customs Office- Florida
- Western Australia Advisors – Perth, Australia
- WICPA/PFS Statewide Symposium (Wisconsin)

RADIO/TELEVISION/ON-LINE INTERVIEWS & APPEARANCES

2011	Fox- 34 TV News	Credit Card Debt Management
2011	Fox- 34 TV News	Using Your 401k
2011	Investment News Webcast	Finding and Keeping New Advisors
2008	Financial Planning Podcast	Building a Retirement Focused Practice
2007-2009	AICPA PFP Webinars	Practice Management Issues
2007	Money Show University	www.moneyshow.com – Retirement Redesigned
2004-2009	FPA Virtual Seminars	www.fpanet.org
2003	*Financial Focus*	LOV94, radio
2002	British Broadcasting (BBC)	News Hour
2001	www.financial-planning.com	Modern Masters
2000	netvideonetworks.com	Net Financial News
2000	www.fponline.com	*Financial Planning Magazine*
2000	www.mfmag.com	*Mutual Funds Magazine*

• 2000	www.horsesmouth.com	*Horse's Mouth*	
• 2000	www.pavilion.com	*Pavilion Today*	
• 2000	*Nightly Business Report*	"Early Retirement Offers"	PBS
• 1999	www.moneymag.com	*Money Magazine*	
• 1998	*World News Tonight*	"Stock Market Volatility"	ABC
• 1994	*CBS This Morning*	"Second Marriages"	CBS
• 1993	*Women in Business*	WLRN, Miami	
• 1992/93	*Weekend in South Florida*	Michael Putney	ABC
• 1992/93	*Lifewise*	Emily Aiken	ABC
• 1992	*Nightly Business Report*	"College Funding"	PBS
• 1991	*Financial Fitness*	12-week producer and host	WLRN- Miami
• 1991	*Good Morning America*	"Budgeting"	ABC

QUOTED AS A NATIONALLY RECOGNIZED EXPERT IN PUBLICATIONS and ONLINE

NATIONAL

- *AARP Magazine*
- *Accent on Living*
- *Accounting Today*
- *Barron's*
- *Bloomberg Personal Finance*
- *Business Week*
- *CFP Biz*
- *Chief Executive Magazine*
- *CNN Money Online*
- *Consumer Reports*
- *Financial Advisor Magazine*
- *Financial Planning Magazine*
- *Forbes Magazine*
- *Fortune Magazine*
- *Good Housekeeping*
- *Inside Information*
- *Investment Advisor*
- *Investment News*
- *Investor's Business Daily*
- *JD Jungle*
- *Journal of Financial Planning*
- *Journal of Retirement Planning*

- *Kiplinger's Personal Finance*
- *Kiplinger Retirement Planning Guide*
- *Kiplinger.com*
- *Korean Journal of Financial Planning*
- *Marketwatch Online*
- *McCall's*
- *Money Magazine*
- *Morningstar Investor*
- *Mutual Fund Magazine*
- *National Public Radio NPR (Online)*
- *National Underwriter*
- *Newsweek*
- *New York Times*
- *PIMCO DC Dialogue*
- *Parade Magazine*
- *Parent Care Advisor*
- *Reader's Digest*
- *Reader's Digest New Choices*
- *Smart Money*
- *Self Magazine*
- *The Wall Street Journal*
- *USA Today*
- *Wealth Manager*
- *Worth Magazine*

REGIONAL

- *South Florida Business – Women's Journal*
- *South Florida Parenting*
- *Sun Sentinel*
- *Tulsa Business Journal*

LOCAL

- *Boston Globe*
- *Colorado Business*
- *Lubbock Avalanche Journal*
- *Lubbock Magazine*
- *Memphis Commercial Appeal*
- *Miami Herald*
- *New Orleans Times Picayune*
- *New York Times*
- *New York Post*

- *Newsday*
- *Oklahoma City Daily Oklahoman*
- *Oklahoma City Journal Record*
- *Orlando Sentinel*

Listed in Wikipedia- www.wikipedia.org under Deena Katz

UNIVERSITY INVOLVEMENT

- SECC- College of Human Science Representative 2010
- APS Personnel Committee 2009
- SECC Volunteer Representative APS 2007, 2008
- University Day and Honors College Speaker 2007
- Guest professor, Chancellor's Honor Class Each semester 2007-present
- APS Committee- Media and External Relationships 2006-2007
- TTU Life Long Learning Program – Retirement 2007
- TTU – TTAAWHE Speaker- Retirement 2007