Ashley McWhorter Keamo

www.linkedin.com/in/ashleymcwhorterkeamo

EDUCATION

Texas Tech University — **Lubbock, TX**
Ph.D. Personal Financial Planning — **GPA: 4.0** — *August 2025*

Texas Tech University — **Lubbock, TX**
Master of Science in Personal Financial Planning — **GPA: 4.0** — *December 2022*

University of California San Diego — **San Diego, CA**
Master of Arts in Latin American Studies — **GPA: 3.93** — *June 2020*

Brigham Young University — **Provo, UT**
Marriott School of Management — *Aug. 2014*
Bachelor of Science in Business Management — **GPA: 3.89**
Marketing Emphasis
Theatre Arts Studies Minor
Graduated Cum Laude

Universidad de Alcalá – Alcalingua — **Madrid, Spain**
Intensive Spanish Language Program — *Oct. 2015 – May 2016*

TEACHING EXPERIENCE

Assistant Professor — **Lubbock, TX**
Texas Tech University — *Aug. 2025 - present*
- Instruct 32 undergraduate students in a Risk Management introductory course
- Instruct 19 undergraduate students in the PFP Capstone course

Teaching Assistant — **Lubbock, TX**
Texas Tech University — *May 2025 - Aug. 2025*
- Assisted with grading and feedback for 21 students of a Retirement Planning class
- Created eMoney assignments and tools for student software education

Graduate Student Instructor — **Lubbock, TX**
Texas Tech University — *Aug. 2024 - May 2025*
- Instructor of record for undergraduate Risk Management and SIE Exam Prep classes
- Responsible for lesson prep, instruction, grading, and class design for 41 students

Teaching Assistant — **Lubbock, TX**
Texas Tech University — *Aug. 2024 - May 2025*
- Assisted with grading and feedback for 21 students of a PFP Capstone class
- Mentored students and provided eMoney support

Teaching Assistant — **San Diego, CA**
University of California San Diego — *Sept. 2018 – June 2020*
- Taught writing classes to 170 students in total

- Provided feedback on student writing skills and content comprehension
- Designed lessons to focus on critical thinking, primary source reading, and argumentative essay construction

Volunteer English Tutor **Springville, UT**
BYU Idaho Pathway Program *Sept. 2017 – Dec. 2017*

- Tutored a student from Mexico City via Skype once a week
- Helped improve English language skills with a focus on pronunciation, vocabulary, and grammar

Volunteer Tutor **Provo, UT**
Project Read *Sept. 2014 – Aug. 2015*

- Tutored a student for approximately three hours a week to improve student literacy
- Created lesson plans to increase reading fluency for a student with dyslexia
- Taught phonetics, grammar, spelling, and vocabulary

Teaching Assistant **Provo, UT**
Brigham Young University *May 2014 – Jun. 2014*

- Worked as an assistant to the Marketing Management professor for 150 students
- Provided feedback to students and input grades
- Taught weekly review sessions and mentored students

RESEARCH EXPERIENCE

Graduate Student **Lubbock, TX**
Texas Tech University *Aug. 2024 – Aug. 2025*

- Conducted primary data collection and qualitative analysis for a dissertation project
- Interviewed financial therapy professionals to extract insights on the subject of financial infidelity
- Completed a peer-reviewed research presentation with findings

Graduate Research Assistant **Lubbock, TX**
Texas Tech University *Aug. 2021 – July 2022*

- Compiled and cleaned data in preparation for analysis
- Assisted with program marketing efforts
- Provided feedback on course materials

Graduate Student **San Diego, CA**
University of California San Diego *Sept. 2018 – June 2020*

- Investigated the subject of consumer trust in financial institutions within South America
- Created and translated a survey experiment
- Collected over 600 responses from university students
- Conducted 30 in-person interviews with citizens of Chile and Argentina
- Analyzed data using STATA and wrote up main project findings
- Managed project budget and expense logistics

Graduate Research Assistant **San Diego, CA**
University of California San Diego *Jan. 2020 – June 2020*

- Investigated issues related to Latin American economics
- Wrote reports with data and references to provide analytical recommendations

Project Manager **Provo, UT**
Qualtrics *Sept. 2014 – Sept. 2015*

- Managed the technical integration for 600+ online sample projects
- Tutored clients concerning software use for research purposes
- Ensured client satisfaction with project results as measured by an NPS average of 9.5
- Provided methodological recommendations to clients to enhance data quality

Behavioral Lab Manager **Provo, UT**
Brigham Young University *Aug. 2013 – Aug. 2014*

- Managed the Behavioral Lab and led a team of four research assistants
- Trained approximately 40 people on equipment use of a Tobii Eye Tracker
- Created SOP documents for lab research
- Recruited participants for two different subject pools
- Managed the use of university subject pools and reported participation to professors
- Trained researchers on use of subject pool and lab

Research Assistant **Provo, UT**
Brigham Young University *Apr. 2013 – Aug. 2014*

- Administered studies to hundreds of participants for five different research projects
- Constructed diverse stimuli for studies
- Prepared data for analysis and edited materials for research projects
- Presented research findings to the marketing department of a non-profit organization

Research Assistant **Mexico City, Mexico**
Brigham Young University *June 2013 – Aug. 2013*

- Completed field studies throughout southern Mexico with approximately 300 participants
- Discovered locations to recruit native indigenous language participants
- Managed project budget and expenses logistics

INDUSTRY EXPERIENCE

Financial Therapy Association
Member of the Financial Therapy Association *Aug. 2023 – present*

Financial Planner **Remote**
Purposeful Strategic Partners *Mar. 2023 – May 2025*

- Provided cash flow analysis, financial education, and goal-oriented financial planning for clients
- Met one-on-one to discuss personalized recommendations for clients
- Worked with Lead Advisor on marketing efforts and business systems

Volunteer Financial Coach **Remote**
Texas Tech University - Knowledge Empowering You *Jan. 2024 - May 2025*

- Met one-on-one with program participants to discuss financial planning options
- Educated participants on foundational financial principles and practices

Associate Financial Advisor **Scottsdale, AZ**
Dew Wealth Management *Aug. 2022 – Mar. 2023*

- Worked with Lead Advisor for financial plan preparation and execution
- Completed financial project analysis per client request
- Communicated with clients to move projects forward

Paraplanner **Remote**
Purposeful Strategic Partners *Sep. 2021 – Aug. 2022*

- Entered client data into firm systems
- Completed analysis projects for various client needs
- Worked with Lead Advisor on marketing efforts and business systems

Analyst **Salt Lake City, UT**
Goldman Sachs Contracted Through PrincePerelson *Mar. 2021 – Aug. 2021*

- Analyzed financial transactions to determine compliance with AML regulations
- Reported to upper management on specialized financial cases

Customer Service Project Manager **Springville, UT**
Ballard Manufacturing *Aug. 2016 – Aug. 2018*

- Daily resolved questions for production employees in Spanish
- Managed ten customer accounts ranging in annual revenue from $5,000 to $100,000

- Created standard operating procedures to develop the Customer Service Department
- Used SAP to research historical trends, enter sales orders, and project future account revenue
- Increased production numbers for top account through customer relationship management

Marketing Intern **Mexico City / Provo**
Academy for the Creation of Enterprise *Jan. 2013 – Aug. 2013*

- Taught introductory sessions of Marketing and SEO techniques in Spanish and English
- Increased the online presence of the Academy

PEER REVIEWED CONFERENCE PRESENTATIONS

- McWhorter Keamo, A. (2024, November 20-22). *Conflict Resolution Skills as a Moderator of Financial Infidelity* [Conference presentation]. Association for Financial Counseling & Planning Education (AFCPE) 2024 Conference, Columbus, OH, United States, virtual option. https://www.afcpe.org/wp-content/uploads/2024/11/Full-Proceedings.pdf
- McWhorter Keamo, A. & Van Cleve, M. (2024, October 9-11). *Love and Money: Measuring Financial Well-being in Cohabiting Versus Married Couples* [Conference presentation]. Texas Tech University 2024 Opportunity Days Biannual Conference, Lubbock, TX, United States.
- McWhorter Keamo, A. & Van Cleve, M. (2025, October 6-8). *Love and Money: Measuring Financial Well-being in Cohabiting Versus Married Couples* [Conference presentation]. CFP Board Connections 2025 Conference, Chicago, IL, United States.
- Van Cleve, M. & McWhorter Keamo, A. (2023, October 5-7). *Don't Tell the Stepparent: Enmeshment and Financial Infidelity in Families with Stepchildren* [Conference presentation]. Financial Therapy Association (FTA) 2023 Conference, Charlotte, NC, United States.
- Van Cleve, M. & McWhorter Keamo, A. (2023, November 20-23). *Untangling Boundaries: Emotional Fusion and Financial Trust in Blended Families* [Conference presentation]. Association for Financial Counseling & Planning Education (AFCPE) 2023 Conference, New Orleans, LA, United States, virtual option. https://www.xcdsystem.com/afcpe/program/J2U32Xr/index.cfm?pgid=878&sid=35358

AWARDS & GRANTS

- School of Personal Financial Planning Outstanding Doctoral Research Award Recipient 2025
- Winner of the 2022 FSP Financial Services Career Competition
- CILAS Fieldwork Grant Recipient 2019
- Tinker Fieldwork Grant Recipient 2019

PUBLICATIONS

- Van Cleve, M., McWhorter Keamo, A., Lutter, S., & Yorgason, J.B. (2024) Financial infidelity in blended families: Determinants and detriments. *Journal of Financial Therapy, 15*(2), 2.
- McWhorter, A. (2020). *Trust and economic strategy: Investments in Chile and Argentina.* [Master of Arts Thesis, University of California San Diego]. ProQuest ID: McWhorter_ucsd_0033M_19575. Merritt ID: ark:/13030/m55t8tsg. Retrieved from https://escholarship.org/uc/item/32c863hd

- McWhorter Keamo, A. (2025) *Financial Infidelity: Healing and Hope*. [Doctoral dissertation, Texas Tech University]. TTU Electronic Theses and Dissertations. Retrieved from https://hdl.handle.net/2346/103313

SKILLS & PERSONAL

- Exams passed: CFP® Exam 2023, Series 65 Exam 2023, SIE Exam 2021
- Technical Skills: eMoney, RightCapital, Wealthbox, Microsoft Office, Excel, Qualtrics, STATA, Canvas
- Communication Skills: Presentations, Writing, Editing, Project Management, Advanced Spanish
- Research Skills: Focus Groups and Interviewing, Field Research, Survey Design, Qualitative Analysis
- Personal: Maine State Poetry Champion 2006, Maine State National Qualifier for Speech 2004 – 2007