Curriculum Vitae

Russell N. James III

russell.james@ttu.edu
806.787.5931
www.EncourageGenerosity.com

Texas Tech University - Box 41210
Lubbock, TX 79409-1210
www.slideshare.net/rnja8c

Research

Topics: Charitable Giving (Current & Estate); Neuroeconomics; Housing & Financial Satisfaction
Methods: Econometric analysis of large survey datasets; functional Magnetic resonance imaging

Employment

Texas Tech University, Department of Personal Financial Planning, Lubbock, TX **2010-present**
Professor & CH Foundation Chair in Personal Financial Planning (2013- present); Associate Professor (2010-2013)
Director of Graduate Studies in Charitable Financial Planning (2010-present)
Texas Tech University School of Law, Adjunct Professor in Charitable Gift Planning (2014- present)
2012 Teacher of the Year: Personal Financial Planning Student Association
Instructor for graduate course in fMRI study design and analysis, 2011
Texas Tech Neuroimaging Institute Advisory Committee (2011, 2013-present)

University of Georgia, Department of Financial Planning, Housing & Consumer Economics, Athens, GA **2006-2010**
Assistant Professor (*Affiliated faculty member: Institute for Nonprofit Organizations*)
2010 Director of College of Family & Consumer Sciences Summer Study Abroad, London, UK
2009 Outstanding Teacher of the Year for the College of Family & Consumer Sciences

University of Missouri, Department of Personal Financial Planning, Columbia, MO **2005-2006**
Visiting Assistant Professor (2005-2006): Estate and gift planning
Adjunct Instructor (1998-1999): Estate and gift planning
Developed first estate and gift planning course as part of the department's new CFP® program

Central Christian College, Moberly, MO **1994-2005**
Teaching Faculty Member (1994-2005)
Courses included Principles of Finance & Law and Principles of Microeconomics
President (2000-2005)
Following 10 of 11 prior years operating in the red, the college consistently operated in the black, unrestricted net assets increased from (-$9,806) to $5,241,829, annual revenue from operations grew 500%, and the college was recognized as the fastest growing Christian college in the US
Director of Planned Giving (1994-2000)
Presented regional seminars and worked with hundreds of donor families in planned giving

Law Offices of Russell James, Moberly, MO and Kansas City, MO **1994-2000**
Private practice limited to estate & gift planning and nonprofit organizations law

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

Stinson Morris Hecker (*aka* Stinson, Mag & Fizzell), Kansas City, MO **1992, 1993**
Law Clerk - *Real estate and litigation divisions*

Shirkey & Robertson, Kansas City, MO **1991**
Law Clerk - *Plaintiff's personal injury firm*

Education

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

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

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

Designations & Certificates
Member of the Missouri Bar **1994-present**
Certified Financial Planner ® **2010-present**
Harvard-MIT Health Sciences & Technology: *Visiting Fellowship in fMRI* **2011**
Mind Research Network at University of New Mexico: *fMRI Image Acquisition and Analysis Course* **2011**
Harvard Business School: *Strategic Perspectives in Nonprofit Management* **2004**

Academic Journal Publications

Charitable Giving (Current & Estate)

1. 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. *[ISI Journal Citation Reports category: social issues]*
2. 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. *[ISI Journal Citation Reports category: gerontology]*.
3. 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.
4. James, R. N., III, & Jones, K. S. (2011). Tithing and religious charitable giving in America. Applied Economics, 43(19), 2441-2450. *[ISI Journal Citation Reports category: economics]*.
5. 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.
6. 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. *[ISI Journal Citation Reports category: social issues]*
7. James, R. N., III. (2009). The myth of the coming charitable estate windfall. The American Review of Public Administration, 39(6), 661-674. *[ISI Journal Citation Reports category: public administration]*
8. James, R. N., III. (2009). Wills, trusts, and charitable estate planning: A panel study of document effectiveness. Financial Counseling & Planning, 20(1), 3-14.
9. James, R. N., III. (2009). An econometric analysis of household political giving in the USA. Applied Economics Letters, 16(5), 539-543. *[ISI Journal Citation Reports category: economics]*
10. 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.
11. 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.
12. James, R. N., III. (2008). Charitable giving and the financial planner: Theories, findings, and implications. Journal of Personal Finance, 6(4), 98-117.
13. James, R. N., III. (2008). Distinctive characteristics of educational donors. International Journal of Educational Advancement, 8(1), 3-12.
14. 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. *[ISI Journal Citation Reports category: social issues]*
15. 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. *[ISI Journal Citation Reports categories: economics, sociology]*
16. 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.

Neuroeconomics

17. James, R. N., III. (2013). Neuroimaging reveals more "second guessing" of non-CFP® advisors during underperformance. *Journal for Financial Planning*, 26(2), 52-59.
18. 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.
19. James, R. N., III. (2011). Applying neuroscience to financial planning practice: A framework and review. *Journal of Personal Finance, 10*(2), 10-65.
20. 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.

21. James, R. N., III. (2011). Cognitive skills in the charitable giving decisions of the elderly. Educational Gerontology, 37(7), 559-573. *[ISI Journal Citation Reports categories: gerontology, educational research]*

22. James, R. N., III. (2011). Charitable giving and cognitive ability. International Journal of Nonprofit and Voluntary Sector Marketing, 16(1), 70-83.

23. 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.

24. Goetz, J., & James, R. N., III. (2008). Human choice and the emerging field of neuroeconomics. Journal of Personal Finance, *6*(4), 13-36.

Housing & Financial Satisfaction

25. Garrett, S., & James, R. N., III. (2013). Financial ratios and perceived household financial satisfaction. *Journal of Financial Therapy*, 4(1), 39-62.

26. 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.

27. 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.

28. 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 *[ISI Journal Citation Reports category: social sciences]*.

29. 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. *[ISI Journal Citation Reports categories: environmental studies, multidisciplinary psychology]*

30. James, R. N., III. (2009). Tenant time preference as a barrier to homeownership. Applied Economics Letters, 16(10), 1073-1077. *[ISI Journal Citation Reports category: economics]*

31. 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.

32. 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.

33. James, R. N., III. (2008). Residential satisfaction of elderly tenants in apartment housing. Social Indicators Research, 89, 421-437. *[ISI Journal Citation Reports categories: sociology, social sciences – interdisciplinary]*

34. 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. *[ISI Journal Citation Reports category: urban studies]*

35. 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.

36. 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.

37. 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.

38. 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.

39. James, R. N., III. (2007). Multifamily housing characteristics and tenant satisfaction. Journal of Performance of Constructed Facilities (ASCE), 21(6), 472-480*. [ISI Journal Citation Reports categories: civil engineering, construction & building technology]*

40. James, R. N., III., & Atiles, J. H. (2008). The transitioning nature of Hispanic renters. Housing Policy Debate, 19(1), 177-206. *[ISI Journal Citation Reports categories: urban studies, planning & development]*

41. 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).

42. 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.

43. Carswell, A. T., & James, R. N., III. (2007). Virtual property manager: Providing a simulated learning environment in a new university program of study. The Journal of Systemics, Informatics, and Cybernetics, 5(4), 34-40.

44. 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. *[WLL ranking category: environment, natural resource & land use law]*

Other Consumer & Financial Issues

45. 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. *[ISI Journal Citation Reports category: business]*

46. 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.

47. 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.

Non-article publications in academic journals

48. James, R. N., III. (2014). Encyclopedia of housing 2nd edition (review of the book). Journal of Urban Affairs, 36 (1), 158-159 *[ISI Journal Citation Reports category: urban studies]*

49. James, R. N., III. (2012). Donor-centered planned gift marketing (review of the book). Nonprofit and Voluntary Sector Quarterly, 41(4), 704-706 *[ISI Journal Citation Reports category: social issues]*

50. James, R. N., III. (2009). Recreating neighborhoods for successful aging (review of the book). Journal of the American Planning Association, *75*(3), 376. *[ISI Journal Citation Reports category: urban studies]*

51. 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. *[ISI Journal Citation Reports category: sociology]*

Conference Proceedings Publications

International Conferences

52. 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.

53. 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.

54. 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.

55. 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.

56. 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

57. 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.

58. 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.

59. 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.

60. 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.

61. 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.

62. 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.

63. 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.

64. 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.

65. 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.

66. 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. Conferences

67. 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

68. 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.

69. James, R. N., III. (2013). This is your brain on financial satisfaction. Fourth Annual Financial Therapy Association Conference, September 29-October 1, Lubbock, TX.

70. 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.

71. 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.

72. 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.

73. 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.

74. 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)

75. 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)

76. 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.

77. 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.

78. 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.]

79. 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.

80. 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

81. 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].*

82. 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

83. 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

84. 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].*

85. 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].*

86. 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.

87. 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.

88. 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.

89. 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.

90. 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.

91. 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.

92. 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.

93. 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.

94. 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.

95. 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.

96. 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.

97. 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.

98. 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].*

99. 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

100. 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*]

101. 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]*

102. 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.

103. 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.

104. 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.

105. 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.

106. 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.

107. 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.

108. 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.

109. 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.

110. 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.

111. 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 conferences attended

Association for Research on Nonprofit Organizations and Voluntary Action Annual Conference, November 15-17, 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
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

European Universities

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.

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.

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.

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.

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.

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.

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.

Universitat Rovira i Virgili – Department of Private, Procedural, and Financial Law. *Introduction to the US legal system.* March 11, 2009, Tarragona, Spain.

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.

Universitat Rovira i Virgili – Department of Private, Procedural, and Financial Law. *REITs in the United States.* March 10, 2009, Tarragona, Spain.

U.S. Universities

Anderson University. *A review of American charitable bequest demographics.* November 11, 2013, Anderson, Indiana.

Kansas State University – Ph.D. program lecture. *Establishing a strong and unique research program.* October, 25, 2013 (online)

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).

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

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.

Ozark Christian College – *Student housing and the economics of institutional growth*. July 27, 2007, Joplin, MO.

University of Georgia – Department of Housing & Consumer Economics Seminar. *Using the Health and Retirement Study in research.* February 18, 2009, Athens, GA.

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.

University of Georgia – Latino Research Forum. *Hispanic renters* (with Jorge Atiles). April 2, 2007, Athens, GA.

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

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.

Greenpeace International Legacy Skill Share. *Neuroimaging and charitable bequest decision-making*, April 30, 2014, Amsterdam, The Netherlands (via video conferencing)

American Council on Gift Annuities Conference. *New results from research – when and how charitable bequest decisions are made*, April 9-11, 2014, Baltimore, MD.

Big 12 Development Conference. *Using neuroimaging to understand donor decision-making*, March 25, 2014, Austin, TX.

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.

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, Baltimore, MD. *Awarded "Stellar Speaker" Designation for receiving overall speaker evaluations of 4.73 on 5 point scale

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.

Planned Giving Council of Houston. (1) *Inside the mind of the bequest donor* , (2) *American charitable bequest demographics*, December 5, 2013, Houston, TX.

American Cancer Society - Nationwide Gift Planning Advisor Council Meeting. *Wills that won't: New evidence on will document usage*, October 23, 2013, online.

National Conference on Philanthropic Planning. *Trending forward: Emerging demographics driving planned giving (with Jackie Franey),* October 15-16, 2013 Minneapolis, MN.

Lubbock Area Association of Fundraising Professionals. *New results on neuroimaging and charitable bequest decision-making*, October 10, 2013 Lubbock, TX.

BNY Mellon Charitable Client Conference. *New demographic trends driving bequest giving,* September 26, 2013, Dallas, TX.

MarketSmart webinar. *Brain science and charitable planning,* September 18, 2013, online.

Planned Giving Council of Central Texas. *Planned giving and the brain*, August 19, 2013, Austin, TX.

Institute of Fundraising Legacy Marketing Group – United Kingdom. *Inside the mind of the legacy donor*, July 17, 2013, London, England.

Remember A Charity Member Meeting – United Kingdom. *Experimental results of marketing interventions to encourage legacy giving*, July 16, 2013, London, England.

National Capital Group Planned Giving Council Annual Conference. *Keynote speaker: Inside the mind of the bequest donor,* May 30, 2013, Arlington, VA.

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.

United Capital Private Wealth Counseling Online Webinar. *Top 10 charitable planning strategies for financial advisors,* March 25, 2013, online.

American Cancer Society Gift Planning Advisor Council Webinar. *Building the scorecard: Estimating propensity for charitable estate giving,* March 21, 2013, online.

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.

Texas Tech Department of Personal Financial Planning "Opportunity Days" Continuing Education Seminars. *Charitable planning for fun and profit*, February 28, 2013, Lubbock, TX.

The Sharpe Group. *Neuroimaging findings and bequest donations*, Jan. 17, 2013, online.

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

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.

Big 12 Gift Planning Conference. *Charitable Bequest Decision-Making: Practical Lessons from Research Findings*, June 6, 2012

West Texas Women's CPA Association. *Charitable Gift Planning 2012: Tax Tips, Techniques, and Trends,* May 17, 2010, Lubbock, TX.

American Cancer Society Gift Planning Advisor Council Webinar. *American Cancer Society – Bequest Donor Acquisition and Maintenance*, October 21, 2011, online.

8th 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.

Sunset Bible Institute. *Development of an Effective Planned Giving Program*, July 12, 2011, Lubbock, TX.

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.

Lubbock Area Association of Fundraising Professionals. *Cracking the Generosity Code: Applying Academic Theory to Fundraising Practice*, June 9, 2011, Lubbock, TX.

Christian Restoration Association. *Creating a free online education product (with examples from EncourageGenerosity.com)*, May 20, 2011, Mason, OH.

Financial Planning Association Retreat. *This Is Your Brain on Finances: Advising Imperfect Humans.* May 4, 2011, Bonita Springs, FL.

Lubbock Area Association of Fundraising Professionals. *Tax Tips, Techniques, Trends and Tomorrow*. March 10, 2011, Lubbock, TX

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.

Jewish Federation of Greater Atlanta. *Charitable estate planning within the Jewish community*. January 21, 2009, Atlanta, GA.

Georgia Planned Giving Council. *New Findings From a 12-year Study of Charitable Estate Planning in Older Adults.* September 15, 2009, Athens, GA.

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.

National Association of Home Builders International Builders Show – NAHB Multifamily Council. *Residential property management at the University of Georgia*. February 6, 2007, Orlando, FL.

Athens Apartment Association & Georgia Apartment Association. *Fair Housing principles in advertising – What residential property managers should know.* November 13, 2006, Athens, GA.

Books and Book Articles and Chapters

112. 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.

113. 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.

114. James, R. N., III (2013). *Inside the Mind of the Bequest Donor*. Charleston, S.C.: CreateSpace.

115. James, R. N., III (2013). *American Charitable Bequest Demographics, 1992-2012.* Charleston, S.C.: CreateSpace.

116. James, R. N., III (2012). Residential satisfaction. In D. Kopec (Ed.), *Environmental psychology for design* (p. 193). New York: Fairchild Books.

117. 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.

118. 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.

119. 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.

120. 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.

121. 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.

122. 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.

123. 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.

124. 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.

125. 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

126. James, R. N., III (2013, December). What's wrong with focusing on bequest intentions from 40-year-olds? <u>Give & Take</u>, 46(12), 3-7 *[circulation 10,000]*

127. James, R. N., III (2013, November). When plans change. <u>Give & Take</u>, 46(11), 3-7

128. James, R. N., III (2012, September/October). Do donor restrictions create more giving? <u>Advancing Philanthropy</u>, 54. *[Association of Fundraising Professionals – Circulation 30,000+]*.

129. James, R. N., III (2012, May). Planned, Major Gifts and the Psychology of Wealth. <u>The Major Gifts Report</u>, 7.

130. James, R. N., III (2012, March/April). Wealth matters. <u>Advancing Philanthropy</u>, 43.

131. James, R. N., III & Katz, D. (2012, February). Giving it away. <u>Financial Planning</u>, 37-38.

132. James, R. N., III. (2012, January/February). Planned giving and the psychology of death. Advancing Philanthrophy, 48.

133. James, R. N., III. (2011, November/December). Do your donors know each other? Advancing Philanthropy, 45.

134. James, R. N., III. (2011, Sept/October). The paradox of empathy. Advancing Philanthropy, 49.

135. James, R. N., III. (2011, July/August). The 'eyes' have it. Advancing Philanthropy, 56.

136. James, R. N., III. (2011, May/June). Touch, trust, and giving. Advancing Philanthropy, 46.

137. James, R. N., III. (2011, January/February). You first: The importance of sequence in gift solicitation. Advancing Philanthropy. 43

138. James, R. N., III. (2010, November/December). Competitive giving. Advancing Philanthropy. 49

139. James, R. N., III. (2010, July/August). This is your brain on charitable giving. Advancing Philanthropy. 54.

140. James, R. N., III. (2010, May/June). Barriers to bequest giving. Advancing Philanthropy. 12-13.

141. James, R. N., III. (2010, March/April). Charitable giving and childlessness. Advancing Philanthropy. 43.

142. James, R. N., III. (2010, January/February). Are you asking often enough? Advancing Philanthropy. 49.

143. James, R. N., III. (2009, November/December). Understanding African-American donors. Advancing Philanthropy. 46.

144. James, R. N., III. (2009, September/October). Perceived benefit: How alumni donations vary with child age. Advancing Philanthropy, 42.

145. James, R. N., III. (2009, July/August). When recognition and reward do not mix. Advancing Philanthropy, 51.

146. James, R. N., III. (2009, May/June). The myth of the coming flood. Advancing Philanthropy, 64.

147. James, R. N., III. (2009, March/April). Do the poor give more? Advancing Philanthropy, 43.

148. James, R. N., III. (2009, January/February). Income and giving. Advancing Philanthropy, 46.

149. James, R. N., III. (2008, November/December). Soliciting donors with a gift. Advancing Philanthropy, 49.

150. James, R. N., III. (2008, September/October). Planned giving: Trends, opportunities and challenges in bequests, endowments and major gifts. Advancing Philanthropy, 48-51.

151. James, R. N., III. (2008, July/August). Fewer recipients = more gifts? Advancing Philanthropy, 47.

152. James, R. N., III. (2008, May/June). After a temporary matching gift expires. Advancing Philanthropy, 64

153. James, R. N., III. (2008, March/April). Stingy baby boomers? Advancing Philanthropy, 42.

154. 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

155. 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]*.

156. 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

157. 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

Research Grants

Texas Tech University College of Human Sciences Faculty Seed Grant

Title: Neural correlates of financial sharing decisions among hyper-empathic individuals
Principal Investigator: Russell N. James III
Date: October 2011 – September 2013
Amount: $5,000

Texas Tech University Office of the Vice President for Research

Title: Charitable giving research start-up funding
Principal Investigator: Russell N. James III
Date: September 2010 – July 2013
Amount: $110,000

The Beautiful Foundation of Korea
Title: Travel grant for presentation of "Giving culture and planned giving" at Giving Korea: The 10th International Symposium on Giving Culture, October 22, 2010, Seoul, Korea
Principal Investigator: Russell N. James III
Date: October, 2010
Amount: $4,000

Association of Fundraising Professionals Foundation for Philanthropy (a nationally-competitive, peer-reviewed research grant)
Title: Between intention and final distribution: An examination of the barriers to charitable estate transfers.
Principal Investigator: Russell N. James III
Date: October 1, 2008 - March 1, 2010
Amount: $5,100

University of Indiana – Center on Philanthropy
Title: An estimate of philanthropic estate distributions for non-taxable estates *[to replace current methodology of Giving USA estimates]*
Principal Investigator: Russell N. James III
Date: November 1, 2008 – June 1, 2009
Amount: $4,500

Legacy Leaders Planned Giving Research Grant (a nationally-competitive, peer-reviewed research grant administered by the Association of Fundraising Professionals in co-operation with Legacy Leaders)
Title: Causes and correlates of charitable giving in estate planning: A cross-sectional and longitudinal examination of older adults.
Principal Investigator: Russell N. James III
Date: October 1, 2007- March 1, 2009
Amount: $4,200

Jewish Federation of Greater Atlanta
Title: Charitable estate planning within the Jewish community
Principal Investigator: Russell N. James III
Date: October 1, 2009-February 1, 2010
Amount: $500

Universitat Rovira i Virgili, Tarragona, Spain
Title: Travel grant for presentations on U.S. mortgage crisis and Real Estate Investment Trusts
Principle Investigator: Russell N. James III
Date: March, 2009
Amount: $4,000

University of Georgia Research Foundation
Title: A longitudinal examination of charitable giving in estate planning using the Health and Retirement Study
Principal investigator: Russell N. James III
Date: January, 2008 - January, 2010
Amount: $1,914

University of Georgia President's Venture Fund (competitive grant)
Title: Travel grant for presentation of "Estimating philanthropic bequests for non-taxable estates in Giving USA" at the Association for Research on Nonprofit and Voluntary Action (ARNOVA) 38th Annual Conference, Cleveland, Ohio.
Principal investigator: Russell N. James III
Date: November, 2009
Amount: $1,085

University of Georgia President's Venture Fund (competitive grant)
Title: Travel grant for presentation of "Valuing revocable charitable estate gifts" at the Association for Research on Nonprofit and Voluntary Action (ARNOVA) 37th Annual Conference, Philadelphia, Pennsylvania.
Principal investigator: Russell N. James III
Date: November, 2008
Amount: $1,500

University of Georgia President's Venture Fund (competitive grant)
Title: Travel grant for presentation of "Tenant satisfaction and structural characteristics of multifamily housing in the U.S." at European Network of Housing Researchers International Conference in Rotterdam, Netherlands
Principal investigator: Russell N. James III
Date: June, 2007
Amount: $2,038

Teaching (*created new course)

Texas Tech University, Lubbock, TX

2012 Instructor of the Year – Department of Personal Financial Planning
*PFP 5325: Introduction to Charitable Planning (2010-present)
*PFP 5326: Advanced Charitable Planning (2011-present)
*PFP 5327: Charitable Giving: Research & Theory (2011-present)
*PFP 5175/ECE 5120: fMRI Study Design and Analysis (2011)
*PFP 5175: Financial Happiness: Satisfaction in Spending & Saving (2012, 2013)
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>U.S.</u>: 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); 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);

<u>International</u>: 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)

University of Georgia, Athens, GA

2009 Outstanding Teacher of the Year – Department of Housing & Consumer Economics
2009 Outstanding Teacher of the Year – College of Family & Consumer Science
*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)
*HACE 5310/7310: Managing Nonprofit & Special Community Housing (2007, 2008, 2009, 2010)

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)

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

Associate Editor

The Journal of Consumer Affairs: *2010-2013*

Editorial Board Member

Financial Counseling and Planning: 2011-2013

Professional Organizations

Certified Financial Planners Board of Standards
- Subject matter expert and CFP® examination item writer

American Council on Consumer Interests
- Board of Directors – Member
- Consumer Policy Committee – Member
- 2012 Housing Track Conference Chair & Conference Submission Reviewer

Association of Fundraising Professionals Research Council - Member
- AFP Skystone Research Prize Book Award Committee – Chair (2011, 2012), Member (2009, 2010)

Giving USA Advisory Council on Methodology – Member (2011, 2012)
Center on Philanthropy at Indiana University – Million Dollar List Methodology Advisory Council (2011, 2012)
American Economic Association - Member
Housing Education and Research Association
- Treasurer for 2008-2010 Term

Awards

CFP® Board's 2009 Financial Planning Paper Award for "The growth of charitable estate planning among Americans nearing retirement" by Russell N. James III, Mitzi K. Lauderdale, & Cliff A. Robb
Housing Education and Research Association's 2008 Early Career Award

Ad Hoc Reviewer

Southern Economic Journal
Journal of Economic Behavior and Organization
Nonprofit and Voluntary Sector Quarterly
Nonprofit Management & Leadership
International Journal of Nonprofit & Voluntary Sector Marketing
Voluntas: International Journal of Voluntary and Nonprofit Organizations
Financial Planning and Counseling
The Journal of Consumer Affairs
Applied Economics
The Journal of Public Relations Research
The Sociology of Religion: A Quarterly Review
Review of Religious Research
Housing & Society
The Journal of Housing and the Built Environment
The Journal of Urban Planning and Development

External examiner

Doctoral dissertation outside committee member for Dalisha Herring, University of Missouri (current)
Masters thesis of Anna R. Erickson, 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" (2010)
Doctoral dissertation of John C. Ronquillo, University of Georgia, Athens, Georgia, "The climate for innovation in public and nonprofit organizations: an analysis of perceptions on motivation, flexibility, and work environment" (2011)

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)

Conference service

Conference chair for housing track of American Council on Consumer Interests, April 11-13, 2012, Memphis, Tennessee.

Presented "REITs, REIT legislation, and Residential Satisfaction in Multifamily Housing" in the 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.

Moderator for roundtable discussion on student housing; Abstract reviewer, Housing Education and Research Association 42nd Annual Conference: Housing at the Crossroads, October 7-10, 2008, Indianapolis, Indiana.

Moderator/discussant for session on Low-Income Housing in Suburbia. A Suburban World: Global Decentralization and the New Metropolis International Conference, April 6-8, 2008, Reston, Virginia.

Symposium panel member. Notes from the field: Using the new housing textbook. Annual Conference of the Housing Education and Research Association, October 23-26, 2007,Charlotte, North Carolina.

Media Citations

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

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

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Behavioral economics lecture slides (www.slideshare.net/rnja8c) have received over 115,000 views.
Charitable tax law slides (EncourageGenerosity.com; slideshare.net/generosity) have received over 12,000 views
CPTED slides and YouTube lecture have received over 9,000 views