MITZI K. LAUDERDALE, J.D., PH.D., CFP®

EDUCATION

Ph.D. (2021), Personal Financial Planning, Kansas State University, Manhattan, KS.
Dissertation: "Three essays on families with disability: Financial satisfaction, subjective financial well-being, and life satisfaction."

J.D. (2005), Law, Texas Tech University School of Law, Lubbock, TX

M.S. (2004), Personal Financial Planning, Texas Tech University, Lubbock, TX

B.S. (2001), Restaurant, Hotel, and Institutional Management with Honors, in Honors Studies, Texas Tech University, Lubbock, TX

PROFESSIONAL AND ACADEMIC APPOINTMENTS (since 2005)

- Vice Provost for Academic Innovation and Student Success (January 2022-present), Texas Tech University, Lubbock, TX
- Associate Academic Dean for Students (September 2013-August 2022), College of Human Sciences, Texas Tech University, Lubbock, TX
- Interim Vice Provost for Student Academic Affairs (September 2020-January 2022), Texas Tech University, Lubbock, TX
- Interim School Director (September 2021-January 2022), School of Personal Financial Planning, Texas Tech University
- Associate Professor (September 2013-present), Personal Financial Planning, Texas Tech University, Lubbock, TX
- Assistant Professor (August 2008-August 2013), Personal Financial Planning, Texas Tech University, Lubbock, TX
- Assistant Professor (January 2006-August 2008), Department of Nutrition, Hospitality, and Retailing, Texas Tech University, Lubbock, TX
- Part-time Instructor (August 2004-December 2005), Department of Nutrition, Hospitality, and Retailing, Texas Tech University, Lubbock, TX
- Student Attorney (May 2005-August 2005), Tax Clinic, School of Law, Texas Tech University, Lubbock, TX

HONORS, AWARDS, AND RECOGNITION

- Texas Academic Leadership Academy Fellow, Cohort #4, 2021-2022
- TTU Faculty Distinguished Leadership Award, College of Human Sciences Nominee, 2021, 2022
- TTU Chancellor's Council Distinguished Teaching Award, 2019
- Raiders Who Rock – Above and Beyond Nominee, 2019
- Teaching Academy Member, Texas Tech University, inducted 2013
- PFP Instructor of the Year, Personal Financial Planning Association, 2011, 2012, 2013, 2018
- Burleson Faculty Service Award, College of Human Sciences, 2015, 2017
- Invited to Mortar Board "Apple Polishing" as a member's Most Inspirational Professor, 2008, 2015
- TTU President's Excellence in Teaching Award, College of Human Sciences, 2013

- College of Human Sciences New Faculty Award, TTU Alumni Association, 2010
- Best Paper, American Council on Consumer Interests, CFP® Board Award, June 2009
- Phi Beta Delta International Scholar Society, inducted 2007
- TTU President's Excellence in Teaching Award NHR Department Nominee, 2007
- Highest Teaching Effectiveness Scores on RHIM Senior Exit Survey, 2006 – 2009
- Invited as Guest Coach, TTU Men's Tennis Team, 2011

LICENSES AND PROFESSIONAL DESIGNATIONS

- Member of the Texas Bar Association, since 2007
- Certified Financial Planner®, since 2013

RESEARCH AND SCHOLARSHIP:

a. Journal Publications:

1. Willis, B., Jai, T. M. & **Lauderdale, M.** (2021). Do U.S. consumers want control over their personal data? The effect of applying GDPR consumer data rights on U.S. consumers' attitudes toward online retailers. *Journal of Consumer Behaviour, 20*(6), 1575-1590. Impact Factor: 3.280
2. Cordell, D., **Lauderdale, M.,** and Pickens, J. (2019). Financial Planning Insights from Research: Concepts Practitioners Can Use. *Journal of Financial Service Professionals, 76*(3).
3. **Lauderdale, M.** and Heckman, S. (2017). Children of Immigrants and College Attainment. *Journal of Family and Economic Issues*, *38*(3), 327-337.
4. Hoffman, M., **Lauderdale, M.**, and Bost, J. (2014). ABC Trust Plan Offers Added Protection from GST Tax. *Practical Tax Strategies, 91(7).*
5. Hoffman, M., **Lauderdale, M.**, and Bost, J. (2014). (Reprint) ABC Trust Plan Offers Added Protection from GST Tax. *Estate Planning, 41(8).*
6. **Lauderdale, M.** and Huston, S. (March 2013). The Team Approach to Financial Planning for Families with Special Needs Dependents. *Journal of Financial Planning, 26*(3).
7. Yuan, J., Fowler, D., Goh, B., and **Lauderdale, M.** (2013). Mexican Cross-Border Shoppers' Motivations to the United States. *International Journal of Culture, Tourism, and Hospitality Research, 7*(4), 394-410.
8. **Lauderdale, M.** and Huston, S. (2012). Financial Therapy and Planning for Families with Special Needs Children. *Journal of Financial Therapy, 3*(1).
9. Fowler, D., **Lauderdale, M.,** Goh, B., and Yuan, J. (2012). Safety Concerns of International Tourists: An Observation in Las Vegas. *International Journal of Culture, Tourism, and Hospitality Research, 6*(3), 238-249.
10. Chatterjee, S., **Lauderdale, M.,** and Gilliam, J. (2011). Employee Benefits in the Hospitality Industry: Inhospitable for Employees? *Journal of Regional and Sectoral Economic Studies, 11*(2).
11. **Lauderdale, M.**, Fowler, D., Goh, B., and Yuan, J. (2011). Tourists' Perception of Personal Safety in the United States – An International Perspective. *Electronic Journal of Hospitality Legal, Safety and Security Research. Vol. 5.*
12. James, R., **Lauderdale, M.**, and Robb, C. (2009). The Growth of Charitable Estate Planning Among Americans Nearing Retirement. *Financial Services Review, 18*(2), 141-156.*TOP TIER JOURNAL
13. **Lauderdale, M.** and Thomas, J. (2009). Are You Gambling With Your Business? What you should know about the legal differences between gambling ashore and afloat. *Journal of Travel and Tourism Marketing, 26*(4), 408-414. *TOP TIER JOURNAL

14. Chan, H.K., **Lauderdale, M.**, and Goh, B. (2007). Accessible Tourism in Taiwan: Attitudes and Perceptions of Lodging Personnel and People with Mobility Disabilities. *HOSTEUR,* 16 (1), 9-16.

b. Refereed Books and Book Chapters

1. Piland Springer, N., and **Lauderdale, M.** (2019). Caregiver and professional perspectives: From financial planning obstacles to optimizing the future. In Brie Turns, Ph.D., Julie Ramisch, Ph.D., and Jason Whiting, Ph.D. (Eds.). *Systemically Treating Autism: A Guide for Empowering Families* (pp. TBD). New York, NY: Routledge.
2. **Lauderdale, M.**, Walther, M. and Springer, N. (2017). Special needs financial planning: Optimizing resources for the future. In Goff, B. S. N., & Springer, N. P. (Eds.). *Intellectual and Developmental Disabilities: A Roadmap for Families and Professionals* (pp. 173-187). New York, NY: Routledge.
3. Bost, J., Hoffman, M., and **Lauderdale, M.** (2015). *Estate Planning and Taxation, 16th Ed.,* Kendall/Hunt.
4. Bost, J., Hoffman, M., and **Lauderdale, M.** (2012). *Estate Planning and Taxation, 15th Ed.,* Kendall/Hunt.

c. Other Publications

1. **Lauderdale, M.** and Heckman, S. (2018). Work Transitions among SSI and SSDI Recipients Nearing Retirement: Employer Accommodations, Private Insurance, and Individuals with Mental Health Disability. Grant report for U.S. Social Security Administration's (SSA's) Analyzing Relationships Between Disability, Rehabilitation and Work found at https://ardraw.policyresearchinc.org/completed-projects/
2. **Lauderdale, M.** and Caudill, A. (2013). Estate Planning for Retirement Benefits. In *The 2013 RMA^{SM} Curriculum 5th ed.*, Retirement Income Industry Association.
3. Hoffman, M., Bost, J., Colaprete, Z., and **Lauderdale, M.** (2011). 2011 *Supplement to Estate Planning and Taxation, 14th Ed.* by John C. Bost, M.S., J.D.

d. Manuscripts and Research Under Review or In Progress:

1. Campbell, B.*, Kalenkoski, C, and **Lauderdale, M.** How do adult protective statutes relate to older Americans seeking insurance advice?. *Financial Planning Review.* Under review.
2. **Lauderdale, M.** and Heckman, S. Bequest Intentions and the Theory of Planned Behavior. Under revision.
3. **Lauderdale, M.** and Heckman, S. SSI and SSDI Usage among Americans: Personality Traits, Insurance, and Mental Health. Under revision.
4. Doyle, A. and **Lauderdale, M.** Case studies of Special Needs Planning Experts. Target journal, *Journal of Financial Planning.*

e. Refereed Presentations and Conference Proceedings Publications

1. Campbell, B. S.*, Kalenkoski, C., and **Lauderdale, Mitzi** (2018). A Place for Mom: Correlation between Mandatory Reporting and Older Americans' Participation in Financial Markets. Academy of Financial Services Annual Conference, Chicago, Illinois. *October 2018.*
2. Anderson, S., Archuleta, K., **Lauderdale, M.,** Potter, D., and Yacob, D.K. (2017). Financial Satisfaction: A Quasi Experimental Design using Solution Focused Brief Therapy. Financial Therapy Association Annual Conference. San Diego, California, *November 2017.*
3. **Lauderdale, M.** and Heckman, S. (2017). Bequest Intentions and the Theory of Planned Behavior. CFP Board Academic Research Colloquium for Financial Planning and Related Disciplines. Washington, D.C., *February 2017*.

2. **Lauderdale, M.** and Colwell, M. (2014). Creating Connections: Activities to Promote Connecting with Students. 10th Annual Advancing Teaching and Learning Conference, Lubbock, Texas, *February 2014*.
3. **Lauderdale, M.** and Huston, S. (2012). Special Needs Caregivers: An Increased Need for Support and Professional Guidance. Academy of Financial Services Annual Conference, San Antonio, Texas *October 2012*.
4. **Lauderdale, M.** and Huston, S. (2012). Letter of Intent: How to Help Special Needs Caregivers Initiate a Plan. Financial Therapy Association Annual Conference, Columbia, MO 2012. *Accepted for September 2012.*
5. **Lauderdale, M.** and Huston, S. (2011). What's the Plan? An Examination of Families with Special Needs Children. Financial Therapy Association Annual Conference, Athens, Georgia.
6. **Lauderdale, M.** (2010). Special Needs Trusts: Detrimental Use of the Sole Benefit Rule. The Academy of Financial Services Annual Conference, Denver, Colorado.
7. **Lauderdale, M.,** Durband, D., Scott, J., and Springer, N. (2010). Progressing Towards Empowering Caregivers and Planners with Special Needs Planning Resources. Academy of Financial Services Annual Conference, Denver, Colorado.
8. Scott, J. and **Lauderdale, M.** (2010). Progressing Towards Empowering Caregivers with Special Needs Planning Resources. Society of Financial Service Professionals Forum, Orlando, Florida.
9. Scott, J., **Lauderdale, M.,** and Stebbins, R. (2010). Progressing Towards Empowering Caregivers and Planners with Special Needs Planning Resources. American Council on Consumer Interests Annual Conference, Atlanta, Georgia.
10. Scott, J., **Lauderdale, M.**, Stebbins, R. and Bagley, M. (2009). Progressing Towards Empowering Caregivers with Special Needs Planning Resources. Society of Financial Service Professionals Forum, Phoenix, Arizona.
11. **Lauderdale, M.** and Stebbins, R. (2009). Special Needs Financial Planning: Assessing Community Awareness. Academy of Financial Services Annual Conference, Anaheim, California.
12. James, R., III., **Lauderdale, M.**, and 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, Milwaukee, Wisconsin. *Best Paper – ACCI CFP ® Board Award.*
13. Chan, H.K., Wu, T.H., **Lauderdale, M.,** and Goh, B. (2009). Customer Needs, Satisfaction, and Loyalty Analysis of Travelers with Disabilities in Lodging Industry. 14th Annual Graduate Education and Graduate Student Research Conference in Hospitality and Tourism, Las Vegas, Nevada.
14. Chan, H.K., Wu, Ti-Hsien, Kizildag, and **Lauderdale, M.** (2008). The Perceptions of Accessible Tourism of the Students Majoring in Hospitality. 13th Annual Graduate Education & Graduate Student Research Conference in Hospitality & Tourism, Orlando, Florida.
15. Yuan, J., **Lauderdale, M.**, Goh, B., and Fowler, D. (2007). International Tourists' Perception of Personal Safety in the United States. Society for Marketing Advances Conference, San Antonio, Texas.
16. Goh, B., Fowler, D., **Lauderdale, M.**, and Yuan, J. (2007). Mexicans Shopping in the United States—An Economic Force in Texas. Society for Marketing Advances Conference, San Antonio, Texas.
17. Chan, H.K., Wu, T.H., Kim, Y., **Lauderdale, M.** (2007). Accessible Tourism in Taiwan: Attitudes and Perceptions of Lodging Personnel and People with Mobility Disabilities. 12th Annual Graduate Education and Graduate Student Research Conference in Hospitality and Tourism, Houston, Texas.

18. Chan, H.K., Wu, T.H., Huang, C.H., and **Lauderdale, M.F.** (2006). The Attitudes and Perceptions of Lodging Personnel and People with Mobility Disability regarding accessible Tourism in Taiwan. 12th Asia Pacific Travel Association and the 4th Asia Pacific CHRIE Joint Conference, Hualien, Taiwan.
19. Chan, H.K., Wu, T.H., Goh, B.K., and **Lauderdale, M.F.** (2006). The Perception and Attitude of Accessible Tourism by Lodging Personnel and People with Disabilities in Taiwan. Texas CHRIE, Lubbock, Texas.

f. Refereed Poster Presentations and Conference Proceedings Abstract Publications

1. **Lauderdale, M.** and Springer, N. (2012). Obstacles, Challenges, Stressors, Finding Our Way: Results of a Special Needs Caregiver Focus Group. Financial Therapy Association Annual Conference, Columbia, MO 2012.
2. **Lauderdale, M.,** Scott, J., and Springer, N. (2011). A Report on the Special Needs Planning Community Training Modules. Association for Financial Counseling and Planning Education Annual Conference, Jacksonville, Florida. Poster Session.
3. Wongjarupun, S. and **Lauderdale, M.** (2008). International Students Studying Abroad: Academic or Tourism? International CHRIE Conference, Atlanta. Poster Session.
4. Friedman, L. and **Lauderdale, M.** (2008). From Congress to Farm to Table Impact on the Hospitality Industry by changes in Food Stamps: The 2007 United States Farm Bill. 13th Annual Graduate Education & Graduate Student Research Conference in Hospitality & Tourism, Orlando, Florida. Poster session.

g. Scholarship of Teaching Presentations

1. **Lauderdale, M.** (2018). *Avoiding Grade Appeals, and what is FERPA?* 32nd Annual New TA Orientation Workshop, Lubbock, TX, August 2018.
2. Invited Panelist: *Expert Teacher Session.* 30th Annual New TA Orientation Workshop, Lubbock, TX, August 2016.
3. **Lauderdale, M.** and Colwell, M. (2014). *Creating Connections: Activities to Promote Connecting with Students.* 10th Annual Advancing Teaching and Learning Conference, The Texas Tech University Teaching, Learning, and Professional Development Center, Lubbock, TX, February 2014.
4. Invited Panelist: *What the Best Teachers Do: Changes I have made to My Teaching.* Teaching, Learning, and Professional Development Center, September 2013.

h. Other Research Presentations

1. **Lauderdale, M.** and Heckman, S. (2018). SSI and SSDI Usage Among Americans Nearing Retirement. Financial Planning Research Series, Lubbock, TX, November 2018.
2. **Lauderdale, M.** and Heckman, S. (2018). SSI and SSDI Usage Among Americans Nearing Retirement. Financial Planning Research Series, Lubbock, TX, November 2018.

GRANTS, EXTERNAL FUNDING, AND DEVELOPMENT ACTIVITIES:

a. Funded:

1. Work Transitions among SSI and SSDI Recipients Nearing Retirement: Employer Accommodations, Private Insurance, and Individuals with Mental Health Disability. Analyzing Relationships between Disability, Rehabilitation and Work Small Grant Program for graduate students, Social Security Administration, $10,000. Lauderdale, M. and Heckman, S., 2017-2018.
2. PFP Double T Society Development Campaign in conjunction with the PFP Alumni Advisory Board. Currently $250,000 in unrestricted gifts and pledges. Committee Member, 2011-current.

3. Family Financial Planning Education: Supporting Children with Special Needs. The CH Foundation. $51,084. Lauderdale, M. and Springer, N. 2009-2011.
3. Charitable Life Insurance Analysis. TTU College of Human Sciences New Faculty Grant. $5,000. Lauderdale, M., September 2008 – August 2009.
4. International Tourism: Tourists' perception of information, property, and personal safety while traveling in Texas. TTU College of Human Sciences New Faculty Grant. $4,500. Lauderdale, M., September 2006 – August 2007.

b. Submitted/unfunded:

1. Project SAFE (Supplemental Security And Financial Education) for Individuals with Developmental Disabilities and their Families. Texas Planning Council for Developmental Disabilities. $299,621. Banda, D., Carter, S., Lauderdale, M., and Guillemette, A. 2019-2022.
2. Texas Tech Financial Planning Camp. T.D. Ameritrade Institutional NextGen Grant Program. $50,000. Browning, C., Lauderdale, M., Katz, D., and Hampton, V. 2014 and 2015.
3. Texas Tech Financial Planning Camp. Texas Tech Alumni Association. $10,000. Browning, C., Lauderdale, M., Katz, D., and Hampton, V. 2014.
4. Special Needs Financial Planning: Utilizing Solution Focused Brief Therapy. TTU Creative Arts, Humanities and Social Sciences Competition. $9,993. Lauderdale, M. 2011.
5. Family Financial Planning Education: Supporting Children with Mental Health Needs. Hogg Foundation for Mental Health. $15,000. Lauderdale, M. 2010.
6. Case studies as an active learning tool: 3-D animation technology to enhance education practice. TTU Office of the Vice President for Research, Education Research Initiative. $125,000. Fitzpatrick, J., Colwell, M., Lauderdale, M., and Ivey, D., July 2008.
7. International Tourists: Their Perceptions of Safety, Their Shopping Behaviors, & Their Economic Impact. TTU Office of the Vice President for Research, Research Development Grant. $237,940. Yuan, J., Lauderdale, M., Fowler, D., and Goh, B., September 2007.
8. International Tourists: Their Perceptions of Safety and Security, Their Shopping Behaviors, & Their Economic Impact. TTU Office of the Vice President for Research, Research Development Grant. $237,940. Goh, B., Yuan, J., Lauderdale, M., & Fowler, D., September 2006.

TEACHING:

a. Undergraduate Courses – *Restructured and Taught, ** Developed Course

1. PFP 1115: Introduction to Personal Financial Planning**
2. PFP 2315: Personal Financial Planning for Professionals
3. PFP 3378: Estate Planning*
4. PFP 2333/3333: Legal and Regulatory Aspects of Personal Financial Planning**
5. PFP 4000: Strategic and Tactical Special Needs Planning**
6. PFP 4175: Special Topics in Special Needs Financial Planning**
7. PFP 4377: Practicum in Personal Financial Planning: Special Needs Planning**
8. RHIM 3341: Hospitality Management*
9. RHIM 4313: Legal Aspects of the Hospitality Industry*
10. RHIM 4312: Beverage Control Management*
11. IS 1100: Tech Transition: Freshman Seminar
12. PADR 0041: Strategies for Academic Achievement for the College of Human Sciences Major

b. Graduate Courses – *Restructured and Taught, ** Developed Course

1. PFP 5175: Special Topics in Special Needs Financial Planning**
2. PFP 5311: Strategic and Tactical Special Needs Planning**
3. PFP 5320: Legal and Regulatory Aspects of Personal Financial Planning**
4. PFP 5390: Practicum in Personal Financial Planning: Special Needs Planning**
5. PFP 5398: Estate Planning*
6. LAW 6415: Wills and Trusts
7. RHIM 5341: Strategic Management in the Hospitality Industry*
8. RHIM 6322: Financial Management in Hospitality Administration*
9. RHIM 6345: Hospitality Business Ethics**

c. Dissertation and Thesis Committees

1. Matthew Jaramillo (ABD). PFP, Dissertation Committee Member
2. Langdon, Tom (ABD). PFP, Dissertation Committee Member
3. Blake Gray (ABD). PFP, Dissertation Committee Member
4. Yan, Ying (Graduated 2020). PFP, Dissertation Committee Member
5. Hussein, Reem (Graduated 2020). PFP, Dissertation Committee Member
6. Campbell, Steele (Graduated 2020). PFP, Dissertation Committee Member
7. Dorjsuren, Davaajargal (Graduated 2019). PFP, Dissertation Committee Member
8. Brooke Willis (Graduated 2019). HRM, Thesis Committee Member
9. Lehman, Jennifer (Graduated 2018). PFP, Dissertation Committee Member
10. Liu, Zhikun (Graduated 2018). PFP, Dissertation Committee Member
11. Lertchaipitak, Areerat Poy (Graduated 2017). PFP, Dissertation Committee Member
12. Chan, Ho Kai (Graduated 2010). RHIM, Dissertation Committee Member
13. Barth, Sean (Graduated 2007). RHIM, Dissertation Committee Member

SERVICE:

a. Internal University:

1. Teaching Academy Executive Committee, Texas Tech University, 2018 - 2021
2. Human Sciences Dean Search Committee, 2019-2020
3. Endowed Professorship Review Ad Hoc Advisory Committee, 2018, 2019, 2020
4. Space Allocations Committee, 2018 - current
5. Enterprise System Management Council, 2020 - current
6. International Undergraduate Admissions Appeals Committee member, 2018-current
7. Undergraduate Admissions Advisory Committee member, 2016-current
8. University Career Center Advisory Board, 2017-current
9. Faculty Development Leave Committee Member, 2016-2019
10. Core Curriculum Social and Behavioral Sciences Subcommittee, 2015-current
11. Student Success and Retention Taskforce (SSRT) Member, 2014-current
12. Terry Scholarship Review Committee, 2013-current
13. Dissertation Fellowship Completion Reviewer, 2019-current
14. Presidential Fellowship Reviewer, 2017-2019
15. Faculty Grievance Committee, 2015-2017
16. Graduate School Representative for Dissertation Committees, ongoing
17. Future Lawyers of Today, Student Organization Faculty Advisor, 2014-2016

18. Lawrence Schovanec Teaching Development Selection Committee, 2014-2016
19. SSRT Advising Subcommittee Co-Chair, 2014-2016
20. National and International Scholarships and Fellowships Student Awards Committee, 2014-2016
21. Graduate School Research Poster Competition Reviewer, 2014, 2015
22. Quality Enhancement Plan (QEP) Topic Selection Committee, 2013-2014
23. Faculty Senate, Human Sciences Representative, 2007-2010, 2012-2013
24. Student Government Association, Faculty Senate Liaison, 2012-2013
25. TTU SACS Reaffirmation Team, Substantive Change Committee, 2012-2013
26. Discipline Committee, 2009-2010, 2011-2012
27. Student Media Committee, 2011-2013
28. Student Code of Conduct Committee, 2013
29. Disciplinary Appeals Committee, 2007-2008
30. Convocations Committee, 2007-2009
31. Academic Programs Committee, 2007-2010
32. Kappa Alpha Theta, Student Organization Faculty Advisor, 2004-2014, 2017-current

b. Internal College:

1. Child Development Research Center Advisory Board Member, 2017-current
2. Dean's Leadership Council, Co-Advisor, 2015-current
3. Teaching Effectiveness Committee, 2014-2017
4. Phi Upsilon Omicron, Co-Advisor, 2015-2019
5. Scholarship Committee, PFP Representative, 2012-2013
6. Faculty Council, PFP representative, 2012-2013
7. State Employee Charitable Campaign PFP/APS Chair, 2009, 2010, 2011, 2012
8. Distinguished Alumni Awards Committee, 2011
9. Curriculum Committee, 2007-2009
10. Alumni Association Board, Vice President, 2006-2007
11. Faculty Council, APS Representative, 2008-2009

c. Internal Department:

1. PFP Ambassadors Co-Advisor, 2012-2021
2. PFP Mentor Program, PFP Advisory Board Liaison and Committee, 2018, 2020-current
3. Personal Financial Planning (PFP) Alumni Advisory Board, Ex Officio, member 2011-current
4. PFP Graduate Recognition Committee, 2012-2021
5. PFP Undergraduate Recruitment Committee, 2012-current
6. PFP Opportunity Days Banquet Committee, 2011-2020
7. PFP Faculty Search Committee, 2008, 2009, 2010, 2011, 2012, 2013, 2015, 2016, 2018, 2019, 2020
8. PFP Personnel Committee, 2016-2019
9. PFP Tenure and Promotion Standards Committee, Chair/Convener, 2016-2019
10. PFP Executive Committee, 2012-2013
11. PFP Professional Responsibility Committee Chair, 2011-2013
12. PFP Scholarship Committee, 2009, 2010, 2011, 2012, 2013
13. PFP GPA Appeals Committee, 2008-2009, 2009-2010 (chair), 2011, 2012, 2013
14. PFP Curriculum Development Committee, 2008-2009

d. External Service:

1. External Reviewer
    a. *Journal of Family and Economic Issues,* 2011-current
    b. *Journal of Financial Planning,* Peer Review Board, 2021-2022
    c. American Council on Consumer Interest Annual Conference Reviewer, 2019-current
    d. *Journal of Financial Therapy,* 2018
    e. Financial Therapy Association Conference, 2011, 2012
    f. Association for Financial Counseling Planning and Education Conference, 2012
    g. Conference Paper Awards Selection Committee, Financial Therapy Association, 2011
2. Society of Financial Service Professionals (FSP), member 2008-2020
3. Paul Mills Financial Service Professionals Foundation Scholarship Selection Committee, 2019, 2020
4. Financial Planning Association, member 2008-current
5. CFP® Item Writing Participant, 2015
6. Lubbock Chapter of FSP, Past President 2014-2015, President 2013-14, President Elect 2012-13, Board Member 2010-12, 2016-17
7. Financial Therapy Association, member 2011-2014
8. Academy of Financial Services, member 2008-2013, 2018-2019
9. American Council on Consumer Interests, member 2010-2011, 2017
10. South Plains Trust and Estate Council, member 2008-2011
11. Texas Young Lawyers Association, member 2007, 2008
12. Lubbock County Bar Association, member 2007-2008
13. Lubbock Young Lawyers Association, member 2007-2008
14. American Bar Association, 2007-2010
15. International Council on Hotel, Restaurant & Institutional Education (I-CHRIE), member 2006-2008
16. Hospitality Educators Association of Texas, member 2006-2008
17. Texas Council on Hotel, Restaurant, and Institutional Education (TX-CHRIE), member 2006-2008
18. Texas Restaurant Association, member 2006-2008
19. Texas Hotel & Lodging Association, member 2006-2008
20. Select Guest Lectures/Invited Speaking Engagements:
    i. Lauderdale, M. Estate Planning for Retirement Benefits. Retirement Management Certification Seminar, February 2012.
    ii. Lauderdale, M. PFP Undergraduate Advice. Texas Tech University, Introduction to Personal Financial Planning, 2009.

OUTREACH AND ENGAGEMENT:

Special Needs Financial Planning

Educational Community Presentations and Material Creation:

1. Presenter: Early Intervention: Planning for Families with Special Needs Children. Continuing Education presentation to the Midland Odessa Business and Estate Council (CLE, CPE, C.E.), May 2018.
2. Presenter: Lauderdale, M. Estate Planning Basics, TTU Human Resources, May 2014.
3. Presenter: Estate Planning Basics: Are you and your family prepared?: Presentation in partnership with the Department of PFP and TTU Human Resources – 2013
4. Creator: Special Needs Financial Planning Educational Modules
5. Co-Presenter: Special Needs Financial Planning Module Introduction, High Point Village, October 2011.

6. Presenter: Special Needs Financial Planning. Family Therapy Symposium, January 2011.
7. Panelist: Lauderdale, M. Living with Disabilities: It Takes a Village. Texas Association of Family and Consumer Sciences, November 2010.

Volunteer and Community Leadership Roles:

1. High Point Village, Board Member, 2020 - present
2. Kappa Alpha Theta Capital Campaign Decade Leader, 2014-16
3. Legal Aid Society of Lubbock, board member 2007-2010, vice president 2009, fundraising committee 2009-2010, branding committee 2010
4. Kappa Alpha Theta, Membership District Director 2007-2010, Co-Advisory Board Chairman 2006, 2008; Advisory Board Chairman 2007, Membership Advisor 2005-2007
5. Kappa Alpha Theta Facilities Corporation, Member 2005-2006, Voluntary Legal Counsel, 2006
6. Lubbock Alumnae Chapter of Kappa Alpha Theta, President, 2005-2006
7. Court Appointed Special Advocates, case volunteer, 2004-2005

Select Media Mentions/Articles:

1. "Lauderdale: 5 common myths about powers of attorney" Lubbock Avalanche Journal, March 15, 2019
2. "Lauderdale: 529 ABLE investment accounts are available for disabled" Lubbock Avalanche Journal, February 2, 2019
3. "Investing and the Aging Brain: 'What Do I Do When I Get Stupid?'" AdvisorOne, July 26, 2012.
4. "Can these people teach financial planning?" Smart Money, February 2012.
5. "Inheriting Debt: What you need to know." CardTrack.com, April 26, 2011.

SELECT CONFERENCES AND TRAINING ATTENDED (since 2008):

a. Academic and Administrative

1. Academy of Financial Services Conference, virtual, 2020
    a. Invited panelist: *Navigating Different Roles in Academia – Women's Panel Discussion*
2. Academy of Financial Services Conference, Chicago, Illinois, 2018
3. Ending Sexual Harassment in the Academy, Lubbock, Texas, 2018
4. Noel Levitz Recruitment and Marketing Conference, Orlando, Florida, 2018
5. Noel Levitz Recruitment and Marketing Conference, Denver, Colorado, 2017
6. American Council on Consumer Interests, Albuquerque, New Mexico, 2017
7. The CFP Board Program Registered Program Conference, Arlington, VA, 2017
8. Academic Research Colloquium for Financial Planning and Related Disciplines, The CFP Board Center for Financial Planning, Arlington, VA, 2017
9. West Texas Regional Meeting of Texas Women in Higher Education, 2016, 2017
10. The American Council on Education (ACE) Annual Conference, San Francisco, California, 2016
11. Regional Symposium for Student Success and Retention, Lubbock, Texas, February 2016
12. AAC&U Institute on High Impact Practices and Student Success, Madison, Wisconsin, 2015
13. Noel Levitz Recruitment and Marketing Conference, Boston, Massachusetts, 2015
14. Practice-Oriented Research Poster Session, Kansas State University, 2015, 2016, 2017
15. Noel Levitz Recruitment and Marketing Conference, Chicago, Illinois, 2014
16. New and Emerging Leaders in Human Sciences Workshop, Tulsa, Oklahoma, 2014
17. Academy of Financial Services Conference, San Antonio, Texas, 2012
18. Financial Therapy Association Conference, Columbia, Missouri, 2012

19. Southern Association of Colleges and Schools Annual Meeting, Dallas, Texas, 2012
20. Association for Financial Counseling Planning Education Conference, Jacksonville, FL, 2011
21. Financial Therapy Association Conference, Athens, Georgia, 2011
22. Academy of Financial Services Conference, Denver, Colorado, 2010
23. American Council on Consumer Interests, Atlanta, Georgia, 2010
24. Academy of Financial Services Conference, Anaheim, California, 2009
25. Academy of Financial Services Conference, Boston, Massachusetts, 2008
26. SAS Workshop, Texas Tech University, May 2008
27. Grants 101, *The Grant Institute,* San Antonio, Texas, January 2008

b. Industry

1. Financial Planning Association, virtual, 2020
2. Academy of Special Needs Planners Annual Conference, virtual 2020
3. Heckerling Institute on Estate Planning, Orlando, Florida, 2020
4. Academy of Special Needs Planners Annual Conference, Chicago, Illinois, 2019
5. Financial Planning Association, Chicago, Illinois, 2018
6. Special Needs and Elder Planning, Stetson Law School, St. Petersburg, Florida, 2017
7. Financial Planning Association and Women in Finance Pre-Conference, Baltimore, Maryland, 2016
8. Building the Pipeline, AAFCS, Lubbock, 2015
9. Financial Planning Association, Seattle, Washington, 2014
10. Special Needs and Elder Planning, Stetson Law School, St. Petersburg, Florida, 2013
11. Financial Planning Association, Orlando, Florida, 2013
12. Financial Planning Association, San Antonio, Texas, 2012
13. Changes and Trends Affecting Special Needs Trusts, Austin, Texas, 2010, 2012
14. Estate Planning, Guardianship, and Elder Law Conference, Galveston, Texas, August 2012
15. Clinic for Advanced Professionals, Society of Financial Service Professionals, Chicago, Illinois, 2012
16. Basic Mediation Training (40 hours), Lubbock Dispute Resolution Center, 2011
17. Estate Planning and Community Property Law Journal Seminar, 2010, 2011
18. ArcherCare Special Needs Planning Externship, Houston, Texas, 2010
19. Financial Planning Association Conference, Anaheim, California, 2009
20. Academy of Financial Services Professionals Conference, Phoenix, Arizona, 2009
21. Evensky & Katz Compliance Externship, Coral Gables, Florida, July 2009
22. Financial Planning Association Conference, Boston, Massachusetts, 2008
23. Schwab Portfolio Management Software Training, TTU, 2008

ADMINISTRATIVE DUTIES:

a. Associate Academic Dean for Students, 2013 – 2022

- Strategically organize efforts related to graduate and undergraduate enrollment management, recruitment, retention, engagement, and persistence to graduation
- Responsible for the CoHS Student Services Team
    - Academic Advising and Retention Office – 1 Director and 6 Academic Advisors
    - Student Recruitment Office – 1 Director and 1 Recruiter

- Serve as a representative on Academic Council, Associate Dean's Council, Committee for Academic Advising and Retention, CoHS Executive Committee, CoHS Administrative Committee, CoHS Grade Appeals Committee, and other committees as assigned
- Represent College of Human Sciences at TTU Undergraduate Admissions Recruiting Events
- Support students in need, students in crisis, and students with concerns
- Serve as the academic integrity appeals officer for the College of Human Sciences
- Assist in the management of student disputes/appeals
- Developed and manage the CoHS Dean's Scholars program and oversaw all other processes related to student scholarships and fellowships
- Advise and convene Dean's Leadership Council of student leaders in CoHS
- Previously responsible for the CoHS Marketing and Communications Team: 1 Director, 2 Multimedia Specialist, and student interns

b. Interim Vice Provost for Student Academic Affairs, 2020 – 2021

- Monitor application of university academic policies and facilitate appropriate additions and modifications as appropriate.
- Facilitate resolutions to student academic issues that reach the Provost's office.
- Coordinate through regular meetings and other exchanges with the offices of the Registrar, Admissions, all academic colleges, and related areas in support of curricular and degree program needs.
- Coordinate and facilitate the administration of institutional undergraduate graduation requirements.
- Regularly attend and make reports at monthly meetings of Academic Council, Associate Deans, and Chairs Council. Regularly attend Provost Council.
- Collaborate with other vice provosts across areas of responsibility as these involve curriculum, relevant student issues, commencements, academic policies, and other initiatives and issues that arise.
- Take part in student retention and success initiatives as these are implicated by other functions and responsibility areas.
- Liaise with the lead staff in the Office of the Registrar and associate deans and advising offices to manage student academic matters.
- Attend tenure and promotion reviews and serve in an advisory capacity to the Provost.

c. Interim School Director, School of Personal Financial Planning, 2021

- Ensure continued CFP Board Registered Program status, comply with accreditation standards, and facilitate the renewal process with the CFP Board
- Provide collegial leadership for faculty
- Support faculty in conducting and publishing research in refereed scholarly journals and obtaining external research funding
- Commitment to support and provide guidance for faculty through the tenure and promotion process
- Oversee undergraduate and graduate programs (including traditional, blended/hybrid, and online), including scheduling courses and special events
- Work with industry partnerships
- Participate in outreach and engagement activities in the community and profession
- Provide oversight of budget, facilities, and equipment
- Recruit, mentor, and evaluate faculty and staff
- Advocate for internal and external resource needs of the programs, faculty, staff, and students
- Oversight of the Center for Financial Responsibility

d. *Associate Department Chair, Personal Financial Planning, 2012 – 2014*

- Assessment Leadership for the Department, TracDat Reporting
- Alumni Relations and Alumni Advisory Board
- Opportunity days committee chair, public relations and bragging points coordinator
- Academic integrity violation faculty support
- Enrollment management, COGNOS reporting
- Scholarship committee chair, Graduate recognition committee chair
- PFP student ambassador guidance

e. *Undergraduate Program Director, Personal Financial Planning, 2009 – 2011*

- Direct responsibility for bachelor of science program and minors
- Liaison to COHS advising office
- Resolved higher-level advising issues
- Curriculum management/Degree Plans
    - New course and program approvals, course changes, and course catalog
- Promoted course offerings
- Program certification compliance and renewal (CFP Board of Standards)
- GPA requirement enforcement and counseling
- Student recruiting and retention, Student orientations
- Enrollment management
- COGNOS reporting