

Keith W. Trent, MSBA

Texas Tech University

Rawls College of Business
Finance Department
Lubbock, TX 79409-2101

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Education

Texas Tech University

- Rawls College of Business, M.S.B.A with Finance Concentration 2013
- B.S. Electrical Engineering 1977

Academic Experience

Texas Tech University, Lubbock, TX

- *Lecturer – Area of Finance*, Rawls College of Business, September 2018 - Present
- *Foundations of Finance*
In-person and online classes for the finance portion of the business administration minors class. Basic overview of areas of finance covering, financial markets and interest rates, income tax, time value of money, bonds, stocks, and capital budgeting. Included topic in using real estate for capital budgeting.
- *Principles of Insurance*
An overview class for insurance. Topics includes risk and risk management, legal principles and aspects of insurance, review of insurance contracts, insurance company operations, employee benefits, life insurance, annuities, auto and home insurance.
- *Personal Financial Management*
A comprehensive review of personal finance topics covering, creating financial statements, and budgeting, financial goal setting, personal income tax, purchasing autos and homes, credit and consumer loans, insurance, investments and saving, and the different retirement plans available (Traditional and Roth IRA, 401(k), 403(b)).
- *Real Estate Fundamentals*
Core finance course on real estate fundamentals. Topics covered include operation of the real estate market, property rights and law, finance, mortgages, types of mortgages and sources of commercial debt, valuation, and investment analysis.

Adjunct Instructor – Area of Finance, Rawls College of Business, September 2016 – 2018

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- In-person and online classes for the finance portion of the business administration minors class. Basic overview of areas of finance covering, financial markets and interest rates,

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Lubbock Christian University, Lubbock, TX

Adjunct Instructor –School of Business, 2015

- *Security Analysis and Asset Allocation*
Theory and practice of asset allocation, Topics included setting investment goals, risk tolerance, diversification and risk reduction, basic security analysis, capital markets, investment alternatives and fundamentals of portfolio design.

Teaching Experience

Securities Analysis and Asset Allocation	LCU	2015
Foundations of Finance	TTU	2016 – Present
Personal Financial Management	TTU	2019 – Present
Principles of Insurance	TTU	2020 – Present
Real Estate Fundamentals	TTU	2021 - Present

Professional Experience

Allstate Insurance – Weatherford, Tx 1989 - 2002

- Established an insurance agency with no prior clients and grew agency to a thriving and profitable business. Provided sales and service of multi-line insurance products to insurance clients.

Legacy Financial Management – Lubbock, Tx. 2002 – 2018

- Established a wealth management and advisory business serving primarily individuals, and small business retirement plans. Assisted clients in developing investment strategies to meet financial goals consistent with their risk tolerance.

BentOak Capital – Lubbock and Weatherford, Tx. 2018 - Present

- Legacy Financial Management was merged with BentOak Capital, a wealth management firm. Consulting clients in managing financial goals and investments. Voting member of the Investment Committee and provide mentoring to staff in Lubbock office.

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Certification and Licensing

CERTIFIED FINANCIAL PLANNER™	2006
Chartered Financial Consultant, ChFC American College	2003
Series 7 General Securities Representative	
Series 63 Uniform Securities Agent	
General Lines Agent	1989
• Life, Accident, Health, HMO	
• Property and Casualty	

Organizations

Lubbock Economic Council
• Secretary 2017 - 2018

Service

Insurance, Faculty Advisor
Texas Tech Student Real Estate Organization, Co-Faculty Advisor

Awards and Honors

Nominated for Jerry S. Rawls Excellence in Undergraduate Teaching	2021
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