

TOM BARKLEY

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AREAS OF INTEREST

- **Research:** Derivatives, Alternative Investments, Corporate Valuation, Working Capital Management
- **Teaching:** Derivatives, Alternative Investments, Corporate Finance, Working Capital Management

EDUCATION

- *Ph.D. in Finance*; Finance, Insurance and Real Estate Department, Warrington College of Business, University of Florida, Gainesville, FL Aug. 2007
- *Master of Business Administration in International Management*; Thunderbird, The American School of International Management, Glendale, AZ Dec. 2000
- *Post-Graduate Certificate in Education (Secondary School Mathematics)*; Center for Educational Studies, King's College London, University of London, England July 1993
- *Bachelor of Science in Mathematics (with Honors), Associate of the Royal College of Science*; Imperial College of Science, Technology and Medicine, University of London, England June 1989

PROFESSIONAL DESIGNATIONS/CERTIFICATIONS

- *Certified Treasury Professional*; Association for Financial Professionals (AFP) Dec. 2020
- *Financial Modeling & Valuation Analyst*; Corporate Finance Institute (CFI) July 2020
- *Bloomberg Market Concepts*; Bloomberg May 2020
- *Energy Risk Professional*; Global Association of Risk Professionals (GARP) Aug. 2019
- *Chartered Alternative Investment Analyst*; CAIA Association 2014
- *Chartered Merger and Acquisition Professional*; Middle Market Investment Banking Assoc. July 2010
- *Financial Risk Manager*; Global Association of Risk Professionals (GARP) Nov. 2004
- *Chartered Financial Analyst*; CFA Institute Sep. 2004
- *Exams 1 and 2*; Society of Actuaries 2001

ACADEMIC AND PROFESSIONAL EXPERIENCE

- *Professor of Finance Practice*; Finance Department, Whitman School of Management, Syracuse University, Syracuse, NY Aug. 2018 – Present
- *Assistant Professor of Finance Practice*; Finance Department, Whitman School of Management, Syracuse University, Syracuse, NY Aug. 2011 – Aug. 2018
- *Assistant Professor of Finance*; Finance Department, Whitman School of Management, Syracuse University, Syracuse, NY Aug. 2007 – July 2011
- *Graduate Assistant*; Finance, Insurance and Real Estate Department, Warrington College of Business, University of Florida, Gainesville, FL Aug. 2002 – July 2007
- *Manager Research*; Enron (Research Group), Houston, TX Dec. 2000 – Jan. 2002
- *General Manager*; Publicações Evangélicas Seleccionadas, São Paulo, Brazil Sep. 1998 – Aug. 1999
- *Mathematics Teacher, Database Manager, Head of Physical Education Department*; Kingsway Academy, Nassau, Bahamas Sep. 1993 – Aug. 1998
- *Bank Officer*; National Westminster Bank, PLC, Tonbridge, England Feb. 1991 – June 1992
- *Grocery Assistant*; Sainsbury's, PLC, Norbury and Streatham Common, England June 1989 – Feb. 1991
- *Summer Internship as a Clerical Assistant, Actuarial Valuations Section*; Royal Life Insurance, PLC, Liverpool, England July 1987 – Sep. 1987

RESEARCH

PUBLICATIONS

- “Working Capital Management: Concepts and Strategies,” edited by H. Kent Baker, Greg Filbeck, and Tom Barkley, forthcoming at World Scientific
- “Teaching an Updated Undergraduate Fixed-Income Course,” with H. Kent Baker, Greg Filbeck, Hunter M. Holzhauser, Dianna Preece, and Andrew C. Spieler, forthcoming at *Journal of Financial Education*
- “Free Cash Flow Valuation Analysis,” Chapter 11 in “Equity Markets, Valuation, and Analysis,” edited by H. Kent Baker, Greg Filbeck, and Halil Kiyamaz, John Wiley and Sons, Inc., Hoboken, NJ
- “Interest Rate Risk, Measurement, and Management,” Chapter 3 in “Debt Markets and Investments,” edited by H. Kent Baker, Greg Filbeck, and Andrew C. Spieler, Oxford University Press USA, New York, NY
- “A Panel Discussion on Commodities,” with H. Kent Baker, Greg Filbeck, Jeffrey H. Harris, Hunter M. Holzhauser, Dianna Preece, and Andrew C. Spieler, *Alternative Investment Analyst Review*, Volume 8, Issue 2, 2019.
- “Energy Risk Management,” with Mingwei (Max) Liang and Andrew Spieler, Chapter 24 in “Commodities: Markets, Performance, and Strategies,” edited by H. Kent Baker, Greg Filbeck, and Jeffrey H. Harris, Oxford University Press USA, New York, NY
- “Corporate Payout Policy and CEO Compensation Structure,” with Lee-Hsien Pan and Shaio-Yan Huang, *International Journal of Accounting and Financial Reporting*, Volume 8, June 2018.
- “Permanent Sales Increase and Investment,” with Peter Koveos and Insun Yang, *Journal of Empirical Finance*, Volume 34, December 2015.

COMPLETED WORKING PAPERS

- “Employing Machine Learning Classification Strategies to Identify Outperforming Real Estate Securities,” with Zane W. Carmean, and Milena Petrova
- “The Determinants and Time-Variation of Price Discovery: Evidence from the S&P 500 Index across Stock, Futures, and Options Markets,” with Andy Naranjo, and Mahen Nimalendran
- “Where’s the Liquidity? Information and Trading Costs in Asset Pricing,” with Andy Naranjo, and Mahen Nimalendran
- “Corporate Governance and Firm Performance for Chinese, Hong Kong, Taiwanese and Indian Companies Listed on U.S. Stock Exchanges,” with Lee-Hsien Pan

WORKS IN PROGRESS

- “Working Capital Management: Concepts and Strategies,” co-editor with H. Kent Baker and Greg Filbeck
- “Bond Pricing, Duration and Convexity (between Coupon Payment Dates)”
- “A Comparison of Discounted Cash Flow Methodologies”

RESEARCH TRANSLATION WORK

- “Information Asymmetry around Operational Risk Announcements,” by Ahmed Barakat, Anna Chernobai, and Mark Wahrenburg, published in the *Journal of Banking and Finance* Nov. 2014
- “Aggregate Jump and Volatility Risk in the Cross-Section of Stock Returns,” by Martijn Cremers, Michael Halling, and David Weinbaum, published in the *Journal of Finance* Nov. 2014

CONFERENCE PRESENTATIONS

- “Where’s the Liquidity? Information and Trading Costs in Asset Pricing,” with Andy Naranjo, and Mahen Nimalendran, at the Financial Management Association European Conference, Turin, Italy June 2009

INVITED PRESENTATIONS

- Jamaica Stock Exchange workshops on International Finance and Company Valuation Oct. 2010

- Frank G. Zarb School of Business, Hofstra University, NY Mar. 2009
- New York Accounting and Finance Forum (NYAFF), Binghamton University, NY Sep. 2008

PROFESSIONAL SERVICE (ACADEMIC)

- Session Chair and Discussant at a session of the Annual Southern Finance Association Meeting, Key West, FL Nov. 2022
- Discussant at a session of the Annual Financial Management Association Meetings, Atlanta, GA Oct. 2022
- Discussant at a session of the Annual Financial Management Association Meetings, presented virtually Oct. 2021
- Panelist at a Panel Session on “Equity Markets, Valuation and Analysis” at the Annual Southern Finance Association Meeting, held virtually Nov. 2020
- Panelist at a Panel Session on “Bond Markets and Investments” at the Annual Southern Finance Association Meeting, Orlando, FL Nov. 2019
- Discussant at a session of the Annual Financial Management Association Meetings, New Orleans, LA Oct. 2019
- Attended and successfully completed “Applied Machine Learning” course by Emeritus Institute of Management and Columbia Engineering Executive Education June 2019
- Attended and successfully completed “Teaching with Cases Part I” course at Harvard Business School June 2019
- Panelist at a Panel Session on “Commodities” at the Annual Southern Finance Association Meeting, Asheville, NC Nov. 2018
- Discussant at a session of the Annual Financial Management Association Meetings, San Diego, CA Oct. 2018
- Discussant at a session of the Annual Financial Management Association Meetings, Boston, MA Oct. 2017
- Session Chair and Discussant at several sessions of the Annual Financial Management Association Meetings, Las Vegas, NV Oct. 2016
- Session Chair and Discussant at several sessions of the Annual Financial Management Association Meetings, Orlando, FL Oct. 2015
- Discussant at a session of the Annual Financial Management Association Meetings, Nashville, TN Oct. 2014
- Panelist (substitute) at a Special Panel Session on the “Future of Specialty Masters Programs in Finance” at the Annual Financial Management Association Meetings, Chicago, IL Oct. 2013
- Session Chair, Discussant and Reviewer of Papers for several sessions of the Annual Financial Management Association Meetings, Atlanta, GA Oct. 2012
- Session Chair, Discussant and Reviewer of Papers for several sessions of the Annual Financial Management Association Meetings, Denver, CO Oct. 2011
- Session Chair and Discussant at several sessions of the Annual Financial Management Association Meetings, Reno, NV Oct. 2009
- Invited panelist (one of three) for an Alternative Analysts’ Forum of the New York Society of Security Analysts (NYSSA) – “Equity Options Markets: The Evolving Order for Executing Trades” Nov. 2008
- Session Chair and Discussant at several sessions of the Annual Financial Management Association Meetings, Grapevine, TX Oct. 2008
- Session Chair and Discussant at several sessions of the Annual Financial Management Association Meetings, Orlando, FL Oct. 2007
- Discussant at a session of the Annual Financial Management Association Meetings, New Orleans, LA Oct. 2005
- Ad Hoc Referee for: *Journal of Economics and Business*

PROFESSIONAL SERVICE (INDUSTRY)

- *Northern Credit Union*, Supervisory Committee Member *September 2022 – Present*
- *Countryside Federal Credit Union*, Board Member *June 2015 – August 2022*
- *Countryside Federal Credit Union*, Supervisory Committee Member *June 2013 – August 2022*
- *CFA Institute*, Active volunteer supporting the CFA Program *Mar. 2023*
- *CFA Institute*, Active volunteer supporting the CFA Program *June 2022*
- *CFA Institute*, Active volunteer supporting the CFA Program *Jan. 2022*
- *CFA Institute*, Active volunteer supporting the CFA Program *June 2021*
- *CFA Institute*, Active volunteer supporting the CFA Program *June 2019*
- *CFA Institute*, Active volunteer supporting the CFA Program *June 2018*
- *CFA Institute*, Active volunteer supporting the CFA Program *June 2016*
- *CFA Institute*, Active volunteer supporting the CFA Program *June 2015*
- *CFA Institute*, Active volunteer supporting the CFA Program *June 2014*
- *CFA Institute*, Active volunteer supporting the CFA Program *June 2013*
- *CFA Institute*, Active volunteer supporting the CFA Program *June 2012*

MEDIA CLIPS

- Fall 2015: mentioned in the article “How I Spent Summer Break” in the Whitman Magazine
- Spring 2015: featured in the article “Math Matters” in the Syracuse University Magazine
- 08/12/2015: interviewed by Chris Bolt on Syracuse’s local NPR affiliate, 88.3 WAER, on what the August China currency devaluation could mean for Central New York
- Spring 2014: featured in the article “Professors of Practice Bring Industry Insight to Classroom Curriculum” in the Whitman Magazine
- 12/13/2012: appeared on Financial Fitness, a panel discussion about the fiscal cliff, organized by Vicki Brackens on WCNY
- 09/08/2011: appeared on Financial Fitness, a panel discussion about investment opportunities ten years after 9/11, organized by Dan Pluff on WCNY
- 01/13/2011: appeared on Central Issues, a panel discussion about how to avoid investment fraud and tips for wise investing, organized by George Kilpatrick on WCNY
- 09/30/2010: appeared on Financial Fitness, a panel discussion about investment opportunities in the current economic conditions, organized by Dan Pluff on WCNY
- 12/07/2009: interviewed by WSYR-TV, Channel 9, on the Penn-Traffic bankruptcy and compensation paid to the company’s top executives
- 09/17/2009: appeared on the season opener of Financial Fitness, a panel discussion about the financial year in review organized by Dan Pluff on WCNY
- 08/17/2009: interviewed by Syracuse's local NPR affiliate, 88.5 WAER, about the privatization of airports, specifically Hancock Airport in Central New York
- 03/31/2009: phone interview on WHCU 870 AM about the differences between national and regional banks, and their performance
- 02/27/2009: appeared on a WSTM, Channel 3, news broadcast about Citibank and government ownership
- 11/20/2008: appeared on Financial Fitness, a panel discussion about the economic crisis organized by Dan Pluff on WCNY
- 10/24/2008: appeared on a WCNY Business Close Up panel discussion about the economic crisis
- 10/01/2008: interviewed by Syracuse’s local NPR affiliate, 88.5 WAER, and appeared on WTVH, the local CBS affiliate, on the current turmoil on Wall Street and the proposed bailout
- 09/30/2008: appeared on a Channel 5 panel discussion about the economic crisis
- 09/16/2008: interviewed by CDTV.net and WTVH about the Lehman Brothers collapse, Bank of America buying Merrill Lynch, and investment banking trends
- 09/02/2008: quoted in the September/October 2008 issue of Personal Real Estate Investor magazine in an article about real estate opportunities in Syracuse

- 07/25/2008: commented on the Ford plant conversions in a WSYR-TV report
- 03/18/2008: quoted in the March 18 edition of the Syracuse Post-Standard in an article about the recent sale of Bear Stearns to JP Morgan Chase

TEACHING

SYRACUSE UNIVERSITY

- FIN 659 – Intro to Derivatives – *Lead Instructor* (1 section) (1 section) *Spring 2022*
 - MBA@Syracuse (online)
- FIN 400/600 – Alternative Investments – *Instructor* (1 section) *Spring 2022*
 - Cross-listed course: Undergraduate, MBA, MS in Finance (MSF)
- FIN 459/659 – Intro to Derivatives – *Instructor* (1 section) *Spring 2022*
 - Cross-listed course: Undergraduate, MBA, MS in Finance (MSF)
- FIN 400/600 – Alternative Investments (Intensive) – *Co-Instructor* (2 sections) *Winterim 2023*
 - Cross-listed course: Undergraduate, MBA, MBA@Syracuse, MS in Finance (MSF)
- MBC 700 – Alternative Investments – *Co-Instructor* (1 section) *Fall 2022*
 - MBA@Syracuse (weekend residency)
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1+1 sections) *Fall 2022*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - MBA@Syracuse (online) – *Lead Instructor* (1 section)
- FIN 452/652 – Working Capital Management – *Instructor* (1 section) *Fall 2022*
 - Cross-listed course: Undergraduate, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 751 – Corporate Financial Policy and Strategy – *Lead Instructor* (1 section) *Summer 2022*
 - MBA@Syracuse (online)
- FIN 659 – Intro to Derivatives – *Lead Instructor* (1 section) (1 section) *Spring 2022*
 - MBA@Syracuse (online)
- FIN 400/600 – Alternative Investments – *Instructor* (1 section) *Spring 2022*
 - Cross-listed course: Undergraduate, MBA, MS in Finance (MSF)
- FIN 459/659 – Intro to Derivatives – *Instructor* (2 sections) *Spring 2022*
 - Cross-listed course: Undergraduate, MBA, MS in Finance (MSF)
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1+1 sections) *Fall 2021*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - MBA@Syracuse (online) – *Lead Instructor* (2 sections)
- FIN 452/652 – Working Capital Management – *Instructor* (1 section) *Fall 2021*
 - Cross-listed course: Undergraduate, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 659 – Intro to Derivatives – *Lead Instructor* (3 sections) (2 sections) *Spring 2021*
 - MBA@Syracuse (online)
- FIN 600 – Derivatives – *Instructor* (1 section) *Spring 2021*
 - MBA, MS in Finance (MSF)
- FIN 459 – Intro to Derivatives – *Instructor* (2 sections) *Spring 2021*
 - Undergraduate
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1+2 sections) *Fall 2020*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - MBA@Syracuse (online) – *Lead Instructor* (3 sections)
- FIN 452/652 – Working Capital Management – *Instructor* (1 section) *Fall 2020*
 - Cross-listed course: Undergraduate, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1 sections) *Spring 2020*
 - MBA@Syracuse (online) – *Lead Instructor* (1 section)
- FIN 659 – Intro to Derivatives – *Lead Instructor* (3 sections) (3 sections) *Spring 2020*
 - MBA@Syracuse (online)

- FIN 600 – Derivatives – *Instructor* (1 section) *Spring 2020*
 - MBA, MS in Finance (MSF)
- FIN 459 – Intro to Derivatives – *Instructor* (2 sections) *Spring 2020*
 - Undergraduate
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1+2 sections) *Fall 2019*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - MBA@Syracuse (online) – *Lead Instructor* (3 sections)
- FIN 452/652 – Working Capital Management – *Instructor* (1 section) *Fall 2019*
 - Cross-listed course: Undergraduate, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 659 – Intro to Derivatives – *Lead Instructor* (3 sections) (2 sections) *Spring 2019*
 - MBA@Syracuse (online)
- FIN 600 – Derivatives – *Instructor* (1 section) *Spring 2019*
 - MBA, MS in Finance (MSF)
- FIN 459 – Intro to Derivatives – *Instructor* (2 sections) *Spring 2019*
 - Undergraduate
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1+2 sections) *Fall 2018*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - MBA@Syracuse (online) – *Lead Instructor* (3 sections)
- FIN 452/652 – Working Capital Management – *Instructor* (1 section) *Fall 2018*
 - Cross-listed course: Undergraduate, MS in Finance (MSF), MS in Accounting (MSA)
- SEM 100 – First Year Experience – *Facilitator* (1 section) *Fall 2018*
- FIN 659 – Intro to Derivatives – *Lead Instructor* (4 sections) (2 sections) *Spring 2018*
 - MBA@Syracuse (online)
- FIN 600 – Derivatives – *Instructor* (1 section) *Spring 2018*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 459 – Intro to Derivatives – *Instructor* (2 sections) *Spring 2018*
 - Undergraduate
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1+2 sections) *Fall 2017*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - MBA@Syracuse (online) – *Lead Instructor* (4 sections)
- FIN 452/652 – Working Capital Management – *Instructor* (1 section) *Fall 2017*
 - Cross-listed course: Undergraduate, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 256 – Corporation Finance – *Coordinator* (12 sections), *Instructor* (1 section) *Fall 2016*
 - Undergraduate
- MBC 700 – Energy Risk Management – *Instructor* (1 section) *Summer 2017*
 - MBA@Syracuse (weekend residency)
- FIN 659 – Intro to Derivatives – *Lead Instructor* (4 sections) (1 section) *Spring 2017*
 - MBA@Syracuse (online)
- FIN 600 – Derivatives – *Instructor* (1 section) *Spring 2017*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 459 – Intro to Derivatives – *Instructor* (2 sections) *Spring 2017*
 - Undergraduate
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1+2 sections) *Fall 2016*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - MBA@Syracuse (online) – *Lead Instructor* (4 sections)
- FIN 452/652 – Working Capital Management – *Instructor* (1 section) *Fall 2016*
 - Cross-listed course: Undergraduate, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 256 – Corporation Finance – *Instructor* (1 section) *Fall 2016*
 - Undergraduate
- FIN 659 – Intro to Derivatives – *Lead Instructor* (2 sections) (2 sections) *Spring 2016*

- MBA@Syracuse (online)
- FIN 459 – Intro to Derivatives – *Instructor* (2 sections) *Spring 2016*
 - Undergraduate
- FIN 256 – Corporation Finance – *Coordinator* (5 sections), *Instructor* (1 section) *Spring 2016*
 - Undergraduate
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1+2 sections) *Fall 2015*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - MBA@Syracuse (online) – *Lead Instructor* (2 sections)
- FIN 659 – Intro to Derivatives – *Instructor* (1 section) *Fall 2015*
 - MS in Finance (MSF), MS in Accounting (MSA)
- FIN 400 – Working Capital Management – *Instructor* (1 section) *Fall 2015*
 - Cross-listed course: Undergraduate, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 600 – Advanced Derivatives – *Instructor* (1 section) *Spring 2015*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 459 – Intro to Derivatives – *Instructor* (2 sections) *Spring 2015*
 - Undergraduate
- FIN 301 – Essentials of Finance – *Coordinator* (3 sections) *Spring 2015*
 - Undergraduate
- FIN 256 – Corporation Finance – *Coordinator* (7 sections), *Instructor* (3 sections) *Spring 2015*
 - Undergraduate
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (3 sections) *Fall 2014*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - iMBA (online)
- FIN 400 – Working Capital Management – *Instructor* (1 section) *Fall 2014*
 - Undergraduate
- FIN 301 – Essentials of Finance – *Coordinator* (3 sections) *Fall 2014*
 - Undergraduate
- FIN 256 – Corporation Finance – *Coordinator* (3 sections) *Fall 2014*
 - Undergraduate
- FIN 855 – Financial Management – *Coordinator* (1 section), *Co-Instructor* (1 section) *Spring 2014*
 - MS in Finance (MSF)
- FIN 659 – Intro to Derivatives – *Instructor* (1 section) *Spring 2014*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 459 – Intro to Derivatives – *Instructor* (1 section) *Spring 2014*
 - Undergraduate
- FIN 301 – Essentials of Finance – *Coordinator* (3 sections) *Spring 2014*
 - Undergraduate
- FIN 256 – Corporation Finance – *Coordinator* (7 sections) *Spring 2014*
 - Undergraduate
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (2 sections) *Fall 2013*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 400 – Working Capital Management – *Instructor* (1 section) *Fall 2013*
 - Undergraduate
- FIN 256 – Corporation Finance – *Coordinator* (3 sections) *Fall 2013*
 - Undergraduate
- FIN 455 – Financial Management – *Instructor* (2 sections) *Spring 2013*
 - Undergraduate
- FIN 256 – Corporation Finance – *Instructor* (1 section) *Spring 2013*
 - Undergraduate
- ISM 600 – Managerial Finance – *Instructor* (1 section) *Spring 2013*

- Master of Communications Management (online)
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (3 sections) *Fall 2012*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - iMBA (online)
- FIN 600 – Communication for Financial Managers – *Coordinator, Instructor* (1 section) *Fall 2012*
 - MS in Finance (MSF)
- FIN 455 – Financial Management – *Instructor* (1 section) *Spring 2012*
 - Undergraduate
- FIN 256 – Corporation Finance – *Instructor* (1 section) *Spring 2012*
 - Undergraduate
- ISM 600 – Managerial Finance – *Instructor* (1 section) *Spring 2012*
 - Master of Communications Management (online)
- MBC 628 – Financial Management – *Instructor* (2 sections) *Spring 2012*
 - MBA, MS in Entrepreneurship and Emerging Enterprises (MSE), Master of Media Management
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1 section) *Fall 2011*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 400/600 – Financial Analysis in Practice – *Instructor* (1 section) *Fall 2011*
 - Cross-listed course: Undergraduate, MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 256 – Corporation Finance – *Instructor* (1 section) *Fall 2011*
 - Undergraduate
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1 section) *Spring 2011*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 600 – Advanced Derivatives – *Instructor* (1 section) *Spring 2011*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- MBC 628 – Financial Management – *Instructor* (2 sections) *Spring 2011*
 - MBA, MS in Entrepreneurship and Emerging Enterprises (MSE), Master of Media Management
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (2 sections) *Fall 2010*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
 - iMBA (online)
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (1 section) *Spring 2010*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 751 – Corporate Financial Policy and Strategy – *Instructor* (2 sections) *Fall 2009*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 256 – Corporation Finance – *Instructor* (2 sections) *Spring 2009*
 - Undergraduate
- FIN 751 – Financial Controls in Business – *Instructor* (1 section) *Fall 2008*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)
- FIN 256 – Corporation Finance – *Instructor* (2 sections) *Spring 2008*
 - Undergraduate
- FIN 751 – Financial Controls in Business – *Instructor* (1 section) *Fall 2007*
 - MBA, MS in Finance (MSF), MS in Accounting (MSA)

UNIVERSITY OF FLORIDA

- FIN 4243 – Debt and Money Markets – *Instructor* (2 sections) *Spring 2006*
 - Undergraduate
- FIN 6537 – Derivative Securities – *Instructor* (1 section) *Fall 2004*
 - MBA, Master of Science in Finance (MSF), Master of Arts: International Business (MAIB)
- FIN 6930 – International Finance – *Teaching Assistant* (2 sections each year) *Spring '04-'06*
 - Professional MBA

ACADEMIC HONORS

Teaching

- Oberwager Award for Outstanding Faculty *May 2013*
- Whitman School of Management Faculty of the Year – MBA Student Association *May 2008*

SCHOOL AND UNIVERSITY SERVICE

- MS in Finance Program (Director) *Summer 2011 – Present*
- University Christian Staff and Faculty Association (Co-Founder) *Fall 2019 – Present*
- University Senate Committee on Curriculum (Member) *Fall 2021 – Present*
- University Senate Committee on Budget and Fiscal Affairs (Chair) *Fall 2019 – Spring 2021*
- University Senate Committee on Budget and Fiscal Affairs (Vice Chair) *Fall 2017 – Spring 2019*
- University Senate Committee on Budget and Fiscal Affairs (Member) *Fall 2016 – Fall 2017*
- University Committee for Long Term Course Development for First Year Experience *Summer 2018*
- Fulbright Fellowship Campus Evaluator *Fall 2022*
- Fulbright Fellowship Campus Evaluator *Fall 2021*
- Fulbright Fellowship Campus Evaluator *Fall 2020*
- Fulbright Fellowship Campus Evaluator *Fall 2019*
- Fulbright Fellowship Campus Evaluator *Fall 2018*
- Promotion Committee for Teaching Professor (Member) *Fall 2021*
- Finance Sections of Integrated Core (Coordinator) *Fall 2017*
- Finance Sections of Integrated Core (Coordinator) *Fall 2013 – Spring 2016*
- Working Group for Project A.G.I.L.E. Initiative (Team Leader) *Fall 2017*
- Professor of Practice Ad Hoc Committee *Spring 2015 – Spring 2016*
- Master's Board Committee (Chair) *Spring 2010 – Spring 2016*
- Master's Board Committee (Member) *Fall 2008 – Fall 2009*
- Faculty advisor, Investment Club *Fall 2010 – Spring 2022*
- Faculty advisor, Brazilian Student Association *Spring 2021 – Present*
- Faculty advisor, Whitman on Wall Street *Spring 2022*
- Faculty advisor, Whitman on Wall Street *Spring 2021*
- Faculty advisor, Wall Street Goes Orange *Spring 2020*
- Faculty advisor, Wall Street Goes Orange *Spring 2019*
- Faculty advisor, Wall Street Goes Orange *Spring 2018*
- Faculty advisor, Wall Street Goes Orange *Spring 2017*
- Faculty advisor, Wall Street Goes Orange *Spring 2016*
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- Faculty advisor, Wall Street Goes Orange *Spring 2010*
- Faculty advisor, Wall Street Goes Orange *Spring 2009*
- Faculty advisor, Wall Street Goes Orange *Spring 2008*
- Faculty advisor, Syracuse University teams for CME University Trading Challenge (3 teams) *Fall 2020*
- Faculty advisor, Syracuse University teams for CFA Institute Research Challenge (2 teams) *Fall 2021*
- Faculty advisor, Syracuse University teams for CFA Institute Research Challenge (2 teams) *Fall 2020*
- Faculty advisor, Syracuse University team for CFA Institute Research Challenge *Fall 2019*
- Faculty advisor, Syracuse University team for CFA Institute Research Challenge *Fall 2018*
- Faculty advisor, Syracuse University team for CFA Institute Research Challenge *Fall 2016*
- Faculty advisor, Syracuse University team for CFA Institute Research Challenge *Fall 2015*

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- Faculty advisor, Syracuse University team for CFA Institute Research Challenge *Fall 2013*
- Faculty advisor, Syracuse University team for CFA Institute Research Challenge *Fall 2012*
- Faculty advisor, Syracuse University team for CFA Institute Research Challenge *Fall 2011*
- Graduate recruitment, Brazil *Summer 2014*
- Search Committee (Member), Real Estate Professor of Practice *Dec. 22, 2022 –*
- Search Committee (Member), Assistant Teaching Professor of Finance *Feb. 26, 2021 – May 20 2021*
- Search Committee (Member), Assistant Teaching Professor of Finance *Mar. 13 2017 – May 13, 2017*
- Search Committee (Member), Professor of Practice Statistics *May 1, 2015 – May 28, 2015*
- Search Committee (Member), Assistant Director of Graduate Recruitment *Feb. 24, 2014 – May 1, 2014*
- Search Committee (Member), Assistant Director of Graduate Recruitment *Sep. 3, 2013 – Dec. 1, 2013*
- Search Committee (Member), Assistant Director of Graduate Recruitment *Feb. 2, 2013 – July 1, 2013*
- Search Committee (Member), Assistant Director of Graduate Recruitment *May 9, 2012 – Oct. 23, 2012*
- Recruiting Committee, Finance Department *Fall 2007*