

Robert R. Johnson, Ph.D., CFA, CAIA, CLF

1063 East Water Street, Charlottesville, VA 22902

(215) 539-8986

rrjphd@gmail.com

robertjohnson@creighton.edu

rjohnson@economicindexassociates.com

Professional Employment

Creighton University

Professor of Finance (September 2018 – Present)

Economic Index Associates

Economic Index Associates is a financial index and research firm based in New York City. EIA is home to a new paradigm in index investing that has been researched, developed and tested for over 25 years. The firm provides index data, portfolio analytics and index licensing.

Chairman and CEO (December 2018 – Present)

The American College of Financial Services

The American College is a non-profit educational institution with the highest level of academic accreditation dedicated to leadership in innovative training and development for financial services professionals. The American College served over 26,000 students in 2016 and is the top educator of financial planners and advisors, providing the respected CLU® (Chartered Life Underwriter®), ChFC® (Chartered Financial Consultant®) and RICP® (Retirement Income Certified Professional®) credentials. The American College is also a main provider of education leading to the CFP® (Certified Financial Planner™) certification and has delivered professional education to an estimated 21% of the personal financial advisors, planners, insurance agents, and wealth managers in the United States today.

President and CEO (October 2014 – April 2018)

RS Investments

RS Investments is a San Francisco-based investment management firm that is majority-owned by The Guardian Life Insurance Company. RS Investments offers investment management solutions for institutional and individual investors and the advisors who serve them. The firm's specialized investment platform supports distinct investment teams, each utilizing disciplined and repeatable investment processes to deliver research-driven value, growth, core growth, international, natural resource and fixed income strategies. As of March 1, 2013, RS Investments managed over \$26.0 billion.

Board Member (May 2012 – March 2015)

Creighton University

Professor of Finance (July 2012 – September 2014) Taught courses in the online Master of Security Analysis and Portfolio Management (MSAPM) Program.

Editor of the *Quarterly Journal of Finance and Accounting*.

CFA Institute (previously The Association for Investment Management and Research).
CFA Institute is a global investment management education and membership organization with over 109,000 members and offices in Charlottesville, New York, London, Hong Kong, and Brussels (over 500 employees and revenue of about \$220 million). The CFA program is a graduate-level, self-study program recognized as the gold standard among investment credentials. CFA Institute also has over 135 affiliated local societies around the world.

Senior Managing Director, May 2009 – October 2011. The second ranking officer at the organization and one of eleven members of the CFA Institute Leadership Team (including the CEO) responsible for determining policy and managing the organization. Responsible for educational activities (CFA Program, CIPM Program, conferences, publications (including the *Financial Analysts Journal* a highly rated finance journal), executive education programs, and continuing education programs), advocacy activities, the professional conduct program, Latin American strategy and university relations. Managed over 80% of the revenue creation of the organization, and 125 employees. Served as the Executive Director of the Research Foundation of CFA Institute for the majority of this time. In this and prior roles at CFA Institute:

- Established a practice analysis process that has been recognized as the leading edge of certification industry practice and whereby employers and members participate in continuous refinement of the Global Body of Investment Knowledge and credentialing curriculum.
- Oversaw the creation of custom curriculum owned by CFA Institute which is delivered at a lower cost and in a variety of formats – including e-books and repurposed books for members through a new Wiley/CFA Institute Investment Series.
- Oversaw the development of new testing methods for assessing higher cognitive levels of learning (e.g., Application, Analysis, Evaluation and Synthesis), which now constitute 50% of the 18 hours of examinations that candidates must take across all three levels of the CFA Program.
- Oversaw the growth of annual CFA Program registrations from under 40,000 to over 220,000 and corresponding growth in education staff from fewer than 10 in Charlottesville to nearly 200 around the globe.
- Oversaw the development of a new specialty designation – the Certificate in Investment Performance Measurement.
- Oversaw the integration of two separate divisions into one Education Division and an integrated lifelong learning strategy, which led to the development of a new member portal - MyCFA (previously separate certification program and continuing education divisions with separate managing directors).
- Oversaw the move to expand the live education (conferences and executive education) footprint globally.
- Launched a new university relations initiative with a formal CFA Institute/University partnership program.

- Developed and oversaw a business development strategy in Latin and South America grounded in outreach activities with universities, regulators, and employers.
- Consistently performed outreach around the world with employers, regulators, universities, CFA Institute member societies, and the media, promoting the CFA Program and other CFA Institute activities.
- Oversaw the development of a comprehensive data forensics program to address cheating on the CFA examinations.
- Oversaw the Professional Conduct Program – the unit that upholds the CFA Institute Code of Ethics and Standards of Professional Conduct, exam rules and regulations, and Bylaws to protect the integrity of its membership, designations, and examination programs.

Deputy Chief Executive Officer, November 2007 – May 2009. Second ranking officer at CFA Institute. Responsible for all educational activities, advocacy activities and the professional conduct program. Served as the Executive Director of the Research Foundation of CFA Institute.

Managing Director, Education Division, November 2006 – November 2007. Responsible for all aspects of educational activities for CFA Institute including the Chartered Financial Analyst (CFA) Program, Certificate in Investment Performance Measurement (CIPM) Program, Conferences, Publications, Continuing Education Programs, and Executive Education Programs.

Managing Director, CFA Program and CIPM Programs Division, March 2005 – November 2006. Responsible for all aspects of the CFA Program and CIPM Programs, including curriculum and examination development, standard setting, and examination administration.

Executive Vice President, CFA Program Division August 2003 – March 2005. Responsible for all aspects of the CFA Program.

Senior Vice President, Curriculum & Examination Department. December 1998 – August 2003. Responsible for all aspects of the CFA Program including curriculum and examination development, standard setting, and examination administration.

Vice President, Curriculum & Examination Department. September 1996 – December 1998. Responsible for the curriculum process of the CFA Program.

Creighton University College of Business Administration

Professor of Finance. May 1996 – September 1996. Promoted to Full Professor in May 1996.

Associate Professor of Finance. May 1992 – May 1996. Earned tenure and promotion in May 1992. Developed and implemented the Portfolio Practicum – a two-semester, undergraduate course in which students manage a portion (initially \$100,000) of the Creighton University endowment. Taught courses in investments, corporate finance and derivatives at both the graduate and undergraduate level.

Assistant Professor of Finance. May 1986 – May 1992. Taught courses in investments, corporate finance and derivatives at both the graduate and undergraduate level.

Instructor of Finance. September 1984 – May 1986. Taught undergraduate courses in corporate finance and investments.

JBK Capital Management

President, January 1989 – March 1990. Asset management firm specializing in private client accounts. Managed over \$30 million in assets.

Kutak, Rock & Campbell

Financial Consultant, July 1987 – December 1988. Served as a financial consultant for law firm clients.

Education

Ph.D., University of Nebraska (Finance), December 1988. Dissertation Title: Three Essays on Executive Compensation.

MBA, Creighton University (Finance), May 1982.

BSBA, University of Nebraska-Omaha (Finance), May 1980. Summa cum laude (g.p.a. 4.0)

Leadership at the Peak, Center for Creative Leadership, July 2008.

Designations Earned

Earned CFA Charter, Association for Investment Management and Research, September 1991.

Earned CAIA Charter, Chartered Alternative Investment Analyst Association, April 2011.

Earned CLF Designation, The American College of Financial Services, January 2017.

Publications

86. “[Monetary Policy and Insurance Stock Returns: Do Insurance Stocks Really Benefit from Rising Interest Rate Regimes?](#)” *Risk Management and Insurance Review*. Vol. 22, No. 4, Winter 2019, pp. 367-91. (with Tyler Jensen and Mike McNamara).

85. “[Grasshoppers and Ants in Retirement](#),” *AAIL Journal*, Vol. XL, No. 6, June 2018. (with Michael Finke and Tao Guo).

84. “Insights from the AAIL Asset Allocation Survey,” *Journal of Financial Services Professionals*, Vol. 72, No. 5, September 2018, pp. 67-74. (with Ken Washer and Gerald R. Jensen).

83. “[All That’s Gold Does Not Glitter](#),” *Financial Analysts Journal*, Vol. 74, No. 1, January-February 2018, pp. 69-76. (with Gerald R. Jensen and Ken Washer).

82. "[Deep Value Investing Has Not Gone Out of Style.](#)" *AII Journal*, Vol. XXXIX, No. 1, January 2017, pp. 19-21. (with Tom Robinson and Stephen M. Horan).
81. "[Santa Claus Rally and Firm Size.](#)" *Managerial Finance*, 2016, Vol. 42, No. 8, pp. 817-829. (with Ken Washer and Srinivas Nippani).
80. "[The Increasing Volatility of the Stock Market?](#)" *The Journal of Wealth Management*, Vol. 19, No. 1, Summer 2016, pp. 71-82. Cited in *AII Journal* (with Ken Washer and Randy Jorgensen). Also featured in [The Wall Street Journal](#).
79. "The Association between Fed Policy and Sector Returns." *Journal of Financial Services Professionals*, Vol. 70, No. 3, May 2016, pp. 83-88. (with Gerald R. Jensen and Luis Garcia-Feijoo).
78. "[The Weighting is the Hardest Part.](#)" *Journal of Portfolio Management*, Vol. 42, No. 1, Fall 2015, pp. 53-62. (with Charlie Brayman). Also abstracted by Neeti Goyal in the [CFA Digest](#), vol. 46, no. 3, 2016.
77. "[What to Expect When You're Electing.](#)" *Managerial Finance*, Vol. 41, No. 10, pp. 1032-1045. Cited in the *Wall Street Journal*, *Washington Post* and *CBS Marketwatch*, among others. (with Gerald R. Jensen, Luis Garcia-Feijoo, and Scott B. Beyer).
76. "[When It's Time to Transfer Financial Decision-Making.](#)" *AII Journal*, Vol. XXXVII, No. 9, September 2015, pp. 31-34. (with David A. Littell).
75. "[Follow the Fed, But Be Smart About It.](#)" *AII Journal*, Vol. XXXVII, No. 4, April 2015. (with Gerald R. Jensen and Luis Garcia-Feijoo).
74. "[Yes, Virginia, There is a Global Santa Claus Rally: Statistical Evidence Supports Higher Returns Globally.](#)" *Journal of Financial Planning*, Vol. 28, No. 3 (March 2015), pp. 58-63. (with Ken Washer and Srinivas Nippani). Cited in *USA Today* and *24X7 News (Bahrain)*.
73. "[Emerging Markets: Is the Trend Still Your Friend?](#)" *Global Finance Journal*, Vol. 26, No. 1, 2015. (with C. Mitchell Conover, Gerald Jensen and Andrew Szakmary).
72. "[Strategic Value Investing: Screening for Cash Flow and Value.](#)" *AII Journal*, Vol. XXXVI, No. 5, May 2014, pp. 21-26. (with Tom Robinson and Stephen M. Horan).
71. "[Selecting a Valuation Method to Determine a Stock's Worth.](#)" *AII Journal*, Vol. XXXVI, No. 4, April 2014, pp. 17-22. (with Tom Robinson and Stephen M. Horan).

70. ["The Influence of a Family Business on Portfolio Management: An Asset-Liability Management Approach."](#) *Journal of Wealth Management*, Vol. 17, No. 1, Summer 2014, pp. 14-30. (with Stephen M. Horan).
69. ["How Large are the Benefits of Emerging Market Equities?"](#) *Quarterly Journal of Finance and Accounting*, Vol. 50, No. 3&4 (2014), pp. 88-133. Cited in *aiCIO Magazine*, *The Independent (Ireland)*, *Reuters*, and *IFRAsia.com*. (with Gerald R. Jensen and C. Mitchell Conover).
68. ["An Intuitive Examination of Downside Risk"](#) *Journal of Financial Planning*, Vol. 26, No. 6, June 2013. (with Kenneth M. Washer).
67. ["Human Capital and Behavioral Biases: Why Investors Don't Diversify Enough."](#) *Journal of Wealth Management*, Vol. 16, No. 1, Summer 2013, pp. 9-21. (with Stephen M. Horan). Abstracted in *CFA Digest*, November 2013, Vol. 43, No. 4.
66. ["The Taxation Paradox: It's Global not Local."](#) *Journal of Wealth Management*, Vol. 15, No. 4, Spring 2013, pp. 29-40. (with Stephen M. Horan and Thomas R. Robinson). Abstracted in *CFA Digest*, August 2013, Vol. 43, No. 3.
65. ["The Effectiveness of Asset Classes in Hedging Risk."](#) *Journal of Portfolio Management*, Volume 38, No. 3, Spring 2012, pp. 40-55. (with Luis Garcia-Feijoo and Gerald R. Jensen). Abstracted in *CFA Digest*, November 2012, Vol. 42, No. 4.
64. ["Is Now the Time to Add Commodities to Your Portfolio?"](#) *Journal of Investing*, Vol. 19, No. 3, Fall 2010, pp. 10-19. (with C. Mitchell Conover, Gerald R. Jensen, and Jeffrey M. Mercer). Excerpted in [The American Association of Individual Investors Journal](#), Volume XXXII, No. 12, December 2010, pp. 20-24. Also abstracted in the *CFA Digest*, November 2010, Vol. 40, No. 4, pp. 4-6. Cited in a *Wall Street Journal*, *Institutional Investor*, and a *Dow Jones Newswire* Column. Featured on *BNN*.
63. ["Risk Shifting Around Calls of Convertible Debt."](#) *Financial Review*, Volume 45, No. 3 (2010), pp. 541-556. (with Scott B. Beyer and Luis Garcia Feijóo).
62. ["Can Precious Metals Make Your Portfolio Shine?"](#) *Journal of Investing*, Volume 18, No. 1, Spring 2009, pp. 75-86. Also abstracted in the *CFA Digest*, August 2009, Vol. 39, No. 3:7-9. (with C. Mitchell Conover, Gerald R. Jensen, and Jeffrey M. Mercer). Cited in *Investment News*, *Barron's* and the *Vancouver Island News*, *Metro Valley Newspaper Group*, *Harbour City (Canada) Star*, and *Investment Adviser*. Featured on *China Central Television Finance Channel* November 14, 2008.

61. "[After-Tax Performance Measurement](#)." *Journal of Wealth Management*, Vol. 11, No. 1, Summer 2008, pp. 69-83. Also abstracted in the *CFA Digest*, November 2008, Vol. 38, No. 4, pp. 61-63. (with Stephen M. Horan and Philip Lawton).
60. "[Sector Rotation and Monetary Conditions](#)." *Journal of Investing*, Vol. 17, No. 1, Spring 2008, pp. 34-46. Also abstracted in the *CFA Digest*, August 2008, Vol. 38, No. 3, pp. 66-68. (with C. Mitchell Conover, Gerald R. Jensen, and Jeffrey M. Mercer). Cited in *Financial Times*, *Wall Street Journal*, *USA Today*, *Business Week*, *Business Standard*, and *Money Magazine*, among others.
59. "[Time-varying risk and return characteristics of US and European bond markets: Implications for efficient portfolio allocation](#)." *Journal of Asset Management*, Volume 8, Issue 5, December 2007, pp. 337-350. Also abstracted in the *CFA Digest*, May 2008, Vol. 38, No. 2, pp. 35-37. (with Philip J. Young and Thomas Payne).
58. "[The Presidential Term: Is the Third Year the Charm?](#)" *Journal of Portfolio Management*, vol. 34, no. 2 (Winter 2008), pp. 135-142. Also abstracted in the *CFA Digest*, Vol. 38, No. 3, p. 102. (with Scott B. Beyer and Gerald R. Jensen). Cited in *Financial Times*, *Forbes*, *Worth*, *Chicago Sun Times*, *Chicago Tribune*, *Wall Street Journal*, and *Reuters*, among others.
57. "An Examination of Relative Volatility in the German Debt and Equity Markets," *Journal of Business and Economic Perspectives* 33, Spring/Summer 2007. (with Philip J. Young).
56. "[An Analysis of the Interest Rate Sensitivity of Common Stocks Using Empirical Duration](#)." *Journal of Portfolio Management*, Vol. 33, No. 3, Spring 2007, 85-107. (with Frank K. Reilly and David Wright).
55. "[Gridlock's Gone, Now What?](#)" *Financial Analysts Journal*, Vol. 62, No. 5, Sept/Oct 2006, 21-28. Cited in *Wall Street Journal*, *Financial Times*, *Investment News*, *Kiplinger's*, *New York Times*, *Washington Post* and *MSN.com*, among others. (with Scott B. Beyer and Gerald R. Jensen).
54. "[Is Fed Policy Still Relevant for Investors?: Authors' Response](#)," *Financial Analysts Journal*, Vol. 61, No. 3, May/June 2005, 18-20. (with C. Mitchell Conover, Gerald R. Jensen and Jeffrey M. Mercer).
53. "[Is Fed Policy Still Relevant for Investors?](#)" *Financial Analysts Journal*, Vol. 61, No. 1, Jan/Feb 2005, 70-79. (with C. Mitchell Conover, Gerald R. Jensen and Jeffrey M. Mercer).
52. "[Don't Worry About the Election – Just Watch the Fed](#)." *The Journal of Portfolio Management*, Vol. 30, No. 4, Summer 2004, 101-109. Also abstracted in *The CFA Digest*, Vol. 35, No. 1. (with Scott B. Beyer and Gerald R. Jensen). Cited in

Wall Street Journal Online, Chicago Tribune, Forbes, Smart Money, Nikkei Financial Daily, and Reuters, among others.

51. "[Bond Market Volatility vs. Stock Market Volatility: The Swiss Experience.](#)" *Financial Markets and Portfolio Management*, Vol. 18, No. 1, 2004, 8-23. Also abstracted in *The CFA Digest*, Vol. 35, No. 1. (with Philip J. Young).
50. "[Using Learning Outcome Statements to Guide Learning and Testing: The CFA Program.](#)" *Advances in Financial Education*, Fall 2003, 14-28. (with Jan Squires and George Troughton).
49. "[Time Variation in the Benefits of Managed Futures.](#)" *Journal of Alternative Investments*, Vol. 5, No. 4, Spring 2003, 41-50. (with Gerald R. Jensen and Jeffrey M. Mercer).
48. "[Monetary Policy and Fixed Income Returns.](#)" *Quarterly Review of Economics and Finance*, Vol. 43, No. 1, Spring 2003, 133-146. Also abstracted in *The CFA Digest*, Vol. 33, No. 3. (with Gerald W. Buetow, Gerald R. Jensen and Frank K. Reilly).
47. "[Bond Market Volatility Compared to Stock Market Volatility: Evidence from the UK.](#)" *Journal of Asset Management*, Vol. 3, No. 2, September 2002, 101-111. Also abstracted in the *CFA Digest*, Vol. 35, No. 1, p. 78. (with Philip J. Young).
46. "[Tactical Asset Allocation and Commodity Futures.](#)" *Journal of Portfolio Management*, Vol. 28, No. 4, Summer 2002, 100-111. Also abstracted in *The CFA Digest*, Vol. 33, No. 1, pp. 61-3. (with Gerald R. Jensen and Jeffrey M. Mercer).
45. "[Emerging Markets: When Are They Worth It?](#)" *Financial Analysts Journal*, Vol. 58, No. 2, March/April 2002, 86-95. (with C. Mitchell Conover and Gerald R. Jensen).
44. "[The Real Estate Asset Allocation Decision: Monetary Policy Implications.](#)" *Journal of Real Estate Portfolio Management*, Vol. 7, No. 3, 2001, 215-223. (with Gerald W. Buetow).
43. "[The Diversification Benefits of Commodities and Real Estate in Alternative Monetary Conditions.](#)" *Journal of Alternative Investments*, Vol. 3, No. 4, Spring 2001, pp. 53-61. (with Gerald R. Jensen).
42. "[Mutual Fund Asset Allocation and Federal Reserve Monetary Policy.](#)" *Journal of Investing*, Vol. 10, No. 2, Summer 2001, pp. 103-111. (with Gerald W. Buetow).

41. "[Estimating the Interest Rate Sensitivity of Mixed Asset Portfolios.](#)" *Journal of Wealth Management*, Vol. 3, No.4, Spring 2001, pp. 54-60. Also abstracted in the CFA Digest, Vol. 33, No. 3, pp. 97-98. (with Frank K. Reilly and David Wright)
40. "[Equity Industry Returns and Monetary Policy.](#)" *Journal of Wealth Management*, Vol. 3, No. 4, Spring 2001, pp. 61-68. (with Gerald R. Jensen and Jeffrey M. Mercer).
39. "[Monetary Policy and Real Estate Returns.](#)" *Journal of Economics and Finance*, Vol. 24, No. 3, Fall 2000, pp. 283-293.
38. "[Equity Style and Federal Reserve Policy.](#)" *Journal of Wealth Management*, Vol. 2, No. 4, Spring 2000, pp. 33-40. (with Gerald W. Buetow and Gerald R. Jensen).
37. "[Efficient Use of Commodity Futures in Diversified Portfolios.](#)" *Journal of Futures Markets*, Vol. 20, No. 5, May 2000, pp. 489-506. Also abstracted in *The CFA Digest*, Vol. 31, No. 1, pp. 63-4. (with Gerald R. Jensen and Jeffrey M. Mercer).
36. "[The Inconsistency of Return-based Style Analysis and its Implications.](#)" *Journal of Portfolio Management*, Vol. 26, No. 3, Spring 2000, pp. 61-77. (with Gerald W. Buetow and Dave Runkle).
35. "[International Mutual Fund Returns and Federal Reserve Policy.](#)" *Financial Services Review*, Vol. 8, No. 3, Fall 1999, pp. 199-210. Also abstracted in *The CFA Digest*, Vol. 30, No. 4, 19-20. (with Gerald W. Buetow and Gerald R. Jensen).
34. "[Monetary Conditions and International Investing.](#)" *Financial Analysts Journal*, Vol. 55, No. 4, July/August 1999, pp. 38-48. Also abstracted in *The CFA Digest*, Vol. 30, No. 1, pp. 33-35. (with C. Mitchell Conover and Gerald R. Jensen).
33. "[The CFA Designation and the Finance Curriculum: A Survey of Faculty.](#)" *Journal of Financial Education*. Vol. 25, Fall 1999, pp. 26-36. (with Billy Charlton).
32. "Federal Reserve Monetary Policy and Real Estate Investment Trust Returns." *Real Estate Finance*, Vol. 16, Number 1, Spring 1999, pp. 52-59. Also abstracted in *The CFA Digest*, Vol. 29, No. 4 (with Gerald R. Jensen).
31. "[Monetary Environments and International Stock Returns.](#)" *Journal of Banking and Finance*, Vol. 23, No. 9, September 1999, pp. 1357-1381. (with C. Mitchell Conover and Gerald R. Jensen).
30. "[Presidential Politics, Stocks, Bonds, Bills and Inflation.](#)" *Journal of Portfolio Management*, Vol. 26, No. 1, Fall 1999, pp. 27-32. (with William Chittenden and Gerald R. Jensen). Cited in *CNBC.com* and *Forbes*, among others.

29. "[Stocks, Bonds, Bills and Monetary Policy](#)." *The Journal of Investing*, Vol. 7, No. 3, Fall 1998, pp. 30-36. (with Gerald R. Jensen).
28. "[The Inconsistency of Small-Firm and Value-Stock Premiums](#)." *Journal of Portfolio Management*, Winter 1998, pp. 27-36. Also abstracted in *The CFA Digest*, Vol. 28, No. 3 (with Gerald R. Jensen and Jeffrey Mercer).
27. "[New Evidence on Size and Price-to-Book Effects in Stock Returns](#)." *Financial Analysts Journal*, Vol. 53, No. 6, November/December 1997, pp. 34-42. (with Gerald R. Jensen and Jeffrey Mercer).
26. "[Federal Reserve Monetary Policy and Industry Stock Returns](#)." *Journal of Business Finance & Accounting*, Vol. 24, No. 5 (June 1997), 629-644. (with Gerald R. Jensen and W. Scott Bauman).
25. "[Repurchase Announcements: Lies and False Signals](#)." *Journal of Business Ethics*, Vol. 16 (1997), 1677-1685. (with Beverly Kracher).
24. "[Business Conditions, Monetary Policy, and Expected Security Returns](#)." *Journal of Financial Economics*, Vol. 40, No. 2 (February 1996), 213-37. Also abstracted in *The CFA Digest*, February 1997, Vol. 27, No. 1, pp. 38-40. (with Gerald R. Jensen and Jeffrey M. Mercer).
23. "The Effect of U.S. Discount Rate Changes on Canadian Stock Prices." *Journal of Business and Economic Studies*, Vol. 3, No. 1 (Winter/Spring 1995-6), 33-44 (with Gerald R. Jensen).
22. "[Discount Rate Changes and Security Returns in the U.S., 1962-1991](#)." *Journal of Banking and Finance*, Vol. 19, No. 1 (April 1995), 79-95. Also abstracted in *The CFA Digest*, Vol. 25, No. 4 (Fall 1995), 24-6 (with Gerald R. Jensen).
21. "[The Reaction of Foreign Stock Markets to U.S. Discount Rate Changes](#)." *International Review of Economics and Finance*, Vol. 2, No. 2 (Spring 1993), 181-93. Also abstracted in *International Society of Financial Analysts Digest*, Vol. 6, No. 1 (Spring 1994), 54 (with Gerald R. Jensen).
20. "Prime Rate Changes and Returns to Industries: Announcement Period Evidence." *Quarterly Review of Economics and Finance*, Vol. 34, No. 1 (Spring 1994), 75-93 (with Gerald R. Jensen).
19. "Day of the Week Effects in International Stock Returns: A Post Crash Analysis of Fifteen Nations." *Journal of Business and Economic Perspectives*, Vol. 20, No. 1 (Spring 1994), 12-17.

18. "[An Examination of Stock Price Reactions to Discount Rate Changes Under Alternative Monetary Policy Regimes.](#)" *Quarterly Journal of Business and Economics*, Vol. 32, No. 2 (Spring 1993), 26-51 (with Gerald R. Jensen).
17. "[A Goal Programming Approach for the Allocation of Total Wealth.](#)" *Computers and Operations Research*, Vol. 20, No. 7 (1993), 679-85 (with Marc J. Schneiderjans and Thomas S. Zorn).
16. "Socially Responsible Investing: Using Human Resource Policy as a Selection Criterion." *Journal of Business and Economic Studies*, Vol. 2, No. 1 (Winter/Spring 1993), 9-22 (with Gerald R. Jensen and Joseph Phillips).
15. "Has Expected Stock Volatility Increased?" *American Business Review*, Vol. 10, No. 2 (June 1992), (with Gerald R. Jensen).
14. "[The Association Between Executive Stock Option Plan Changes and Managerial Decision Making.](#)" *Financial Management*, Vol. 20, No. 1 (Spring 1991), 36-43 (with Richard DeFusco and Thomas S. Zorn).
13. "[The Effect of Executive Stock Option Plans on Stockholders and Bondholders.](#)" *Journal of Finance*, Vol. 45, No. 2 (June 1990), 617-27. (with Richard DeFusco and Thomas S. Zorn).
12. "The Effect of Insider Ownership on a Firm's Financial Decisions." *Southern Business Review*, Vol. 15, No. 2 (Fall 1989), 32-42. (with Gerald R. Jensen).
11. "The Effect of Tax Reform on Small Business Capital." *Regional Business Review*, Vol. 8 (May 1989), 5-14.
10. "[The Fallacy of the Interior Decorator Fallacy: How to Customize Portfolios.](#)" *Mid-Atlantic Journal of Business*, Vol. 25, No. 5 (March 1989), 41-51 (with Thomas S. Zorn and Marc Schneiderjans).
9. "[Interstate Bank Acquisitions: An Analysis of the Issues.](#)" *Creighton Law Review*, Vol. 22, No. 3 (1988-1989), 611-664. Also reprinted in *Banking Law Anthology*, Gaithersburg, MD, International Library, Vol. 5 (1989). (with Bradley J. Nielsen and Steven W. Seline).
8. "Are Executives Paid Too Much?" *Business and Society Review*, No. 64 (Winter 1988), 25-7. Also reprinted in *Annual Editions: Human Resources 90/91*, Guilford, CT, Dushkin Publishing Group, Inc., 1990, 162-4 (with Gerald R. Jensen).
7. "Stock Repurchases: Good News for Investors and Traders." *Business and Public Affairs*, Vol. 15, No. 1 (Fall 1988), 15-17 (with Gerald R. Jensen).

6. "Common Stock Repurchases: Evidence From the Crash of '87." *Southern Business and Economic Journal*, Vol. 12, No. 1 (October 1988), 2-13 (with Gerald R. Jensen).
5. "Equipment Leasing: An Attractive Alternative for Ag Lenders." *Regional Business Review*, Vol. 7 (May 1988), 16-22 (with Gerald R. Jensen).
4. "[The Financial World: A Campus and Travel Course.](#)" *Journal of Financial Education*, Vol. 16 (Fall 1987), 26-31 (with Jerome F. Sherman).
3. "The Effect of Visibility on Security Returns." *Southern Business and Economic Journal*, Vol. 10, No. 3 (July 1987), 2-12 (with Gerald R. Jensen).
2. "The Information Content of a Stock's Price History." *Business Journal*, Vol. 2, No. 2 (Spring 1987), 42-7 (with Gerald R. Jensen).
1. "Human Capital: An Added Factor in the Diversification Equation." *American Association of Individual Investors' Journal*, Vol. 7, No. 2 (February 1985), 19-21. Also reprinted in *Investment Decision Making: Collection III*, Chicago, AAIL Press, 1988, 195-7 (with Thomas S. Zorn).

Research Monograph

The Role of Monetary Policy in Investment Management. *The Research Foundation of the Association for Investment Management and Research and Blackwell Series in Finance*. (with Gerald R. Jensen and Jeffrey M. Mercer). November 2000.

Books

[*Invest With The Fed*](#). McGraw-Hill, 2015. (with Gerald R. Jensen and Luis Garcia-Feijoo). Reviewed at <https://blogs.cfainstitute.org/investor/2015/10/01/book-review-invest-with-the-fed/> and <http://www.econdogma.com/book-review-invest-fed/>

[*Strategic Value Investing*](#). McGraw-Hill, 2014. (with Stephen M. Horan and Thomas R. Robinson). Reviewed at <https://blogs.cfainstitute.org/investor/2015/06/26/book-review-strategic-value-investing/> On 2015 approved Berkshire Hathaway Reading List <http://www.mymoneyblog.com/berkshire-hathaway-reading-list.html> On 2016 approved Berkshire Hathaway Reading List <http://www.bookwormomaha.com/sites/bookwormomaha.com/files/BerkshireAnnualMeeting2016Flyer.pdf>

[*Investment Banking for Dummies*](#). Wiley, 2014. (with Matt Krantz)

[*Tools and Techniques of Investment Planning*](#). 3rd edition, National Underwriter Company, 2014. (with Robert J. Doyle, Jr., Stephen R. Leimberg, and Thomas R. Robinson)

Book Chapters

- “Measuring Interest Rate Risk: Effective Duration and Convexity.” Chapter 20 in Volume 3 of *Encyclopedia of Financial Models*, edited by Frank J. Fabozzi (2012), pp. 299-306. (with Gerald W. Buetow).
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- [“Guest Column: Raising capital markets standards through financial education,”](#) by Ulric Rindebro, *Business News Americas*, August 6, 2012.
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- [“The Mettle of Precious Metals,”](#) by Robert R. Johnson and Stephen M. Horan, *Financial Adviser* (UK), April 10, 2008.
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“Setting the Standard for Passing Professional Certification Examinations.” *FMA On-line*. Vol. 1, No. 1. (Spring 2002). (with Dennis Whitney and Jan Squires).

Honors

Recipient of the 2019 Cahill Award for Excellence, Heider College of Business, Creighton University, June 2019. In honor of the Rev. Neil Cahill, SJ, a long-time professor at the Heider College of Business and all-around Creighton institution, the Cahill Award for Excellence recognizes the outstanding efforts, such as committee service, curriculum development and student advising, of faculty and staff during the academic year.

Recipient of the 2013 Alfred C. “Pete” Morley Distinguished Service Award, CFA Institute, June, 2013. This award was established to honor members who have made an extraordinarily significant contribution to CFA Institute, or its predecessor organizations, through their leadership, exceptional stewardship, and outstanding service.

Recipient of the 1994 Robert F. Kennedy Memorial Student Award for Teaching Achievement, Creighton University, May, 1994.

Recipient of the Outstanding Faculty Member of the Year Award, Creighton University Business Administration Council, 1996, 1994, and 1989.

Grants Received

Creighton University, George F. Haddix President’s Faculty Research Fund award for a paper entitled “Has Capital Market Volatility Increased?” March 2014, \$5,000.

Research Foundation of the Association for Investment Management and Research for a monograph entitled “The Role of Monetary Policy in Investment Management.” July 1998, \$20,000.

Chicago Society of Financial Analysts, research award for paper entitled “New Evidence on Size and Market-to-Book Effects in Stock Returns.” March 1996, \$10,000.

Creighton University Graduate School, Summer Faculty Research Fellowship, 1994, \$3,500.

Creighton University Graduate School, Summer Faculty Research Fellowship, 1990, \$3,000.

Other

Financial Expert Review Board Member, Bankrate, June 2021 – present.

Board of Directors, Virginia Institute of Autism, 2017 – 2020.

Member, Strategic Advisory Group, CFA Society Philadelphia, 2016 – 2018.

Member, Investment Management Consultants Association (IMCA) International Policy Task Force, 2013 – 2014.

Member, Advisory Board, NG Endowment, 2011.

Member, International Advisory Board, Risk and Asset Management Research Centre, EDHEC University, 2008 – 2012.
Board of Directors, *Midwest Finance Association*, 2005-2007.
Member, Education Advisory Group, International Accounting Standards Committee Foundation, Summer 2004 – Present.
Board of Advisors, *Journal of Portfolio Management*, Spring 1997 – 2015.
Advisory Board, *Journal of Wealth Management*, Fall 2000 – 2012.
Creighton University College of Business Administration Advisory Council, 2002-3.
Board of Directors, *Eastern Finance Association*, 1999-2002.
FMA International Program Committee, 2005 European Meeting.
FMA Awards Committee, 1997 Annual Meeting.
Reviewer – *Financial Management*, *Financial Practice and Education*, *The Journal of Banking and Finance*, *The Journal of Financial Research*, *Managerial Finance*, and *The Journal of Alternative Investments*.
Contributor – *The CFA Digest* and *Contemporary Finance Digest*.
NASD Industry Arbitrator.
Member, Master of Science in Investment Management Advisory Board and Program Fellows, Boston University, 1999-2000.
Member, Financial Management Association, Eastern Finance Association, Southern Finance Association, Midwest Finance Association.
Visiting Executive – Creighton University College of Business Administration, December 2, 2002.

Professional Research Presentations – Available Upon Request
Radio and TV Appearances – Available Upon Request
Media Quotes – Available Upon Request

Appendix A: Professional Research Presentations

- ["Federal Reserve Monetary Policy and Equity Market Returns,"](#)
WealthManagement.com, November 17, 2021.
- ["Federal Reserve Policy and Asset Returns,"](#) American Association of Individual Investors Conference, Chicago, IL, October 1, 2021.
- ["Investing in a Crisis: What Would Warren Buffett Do?"](#) Business Bites, Greater Omaha Chamber of Commerce and Heider College of Business, Creighton University. June 16, 2020.
- ["It's the Economy, Stupid,"](#) Panel member at *Signature Series of Index Investing & Risk Management*, State University of New York Global Conference Center, New York City, December 4, 2019.
- ["Federal Reserve Policy and Asset Returns,"](#) *American Association of Individual Investors Conference*, Orlando, FL, October 25, 2019.
- "Economic and Market Outlook," *1847 Financial*, Conshocken, PA, February 28, 2018.
- "Economic and Market Outlook," *The American College of Financial Services*, Naples, FL, January 30, 2018.
- "All That's Gold Does Not Glitter," *The CFA Society of Nebraska*, Omaha, NE, January 25, 2018.
- ["Economic Outlook,"](#) *LaSalle University's 17th Annual Economic Outlook*, Union League Club of Philadelphia, January 23, 2018.
- ["What's Working \(And Not\) In Higher Ed,"](#) *NY EdTech Week*, New York University, December 19, 2017.
- "Monetary Policy and Insurance Stock Returns: Do Insurance Stocks Really Benefit from Rising Interest Rate Regimes?" *Paris Financial Management Conference*, Paris, France, December 18, 2017. (with Tyler K. Jensen and Michael J. McNamara).
- "Invest With the Fed," Toledo Chapter of the Society of Financial Services Professionals, Toledo, OH, May 18, 2017.
- "The Year Ahead – The First 100 Days; a Review of the New Administration's Cabinet, Policies, and Strategy, and Implications for Global Markets," *Investment Revolution: The Future of Investing & Risk Management*, Cantor Fitzgerald, Georgetown University, April 4, 2017.

- “Invest With the Fed,” *Kalamazoo Chapter of the Society of Financial Services Professionals*, Kalamazoo, MI, March 29, 2017.
- “Monetary Policy and Insurance Stock Returns,” *Western Risk and Insurance Association Annual Meeting*, Santa Barbara, CA, January 2-5, 2017. (with Tyler K. Jensen and Michael J. McNamara).
- “Invest With The Fed,” Drexel University Executive Briefing, Mavern, PA, December 8, 2016.
- “Invest With The Fed,” *John Hancock Lunch and Learn*, King of Prussia, PA, December 7, 2016.
- “Invest With The Fed,” *Investment Revolution: The Future of Investing & Risk Management – A Cantor Fitzgerald ETF & Portfolio Trading Group Workshop for Institutional Investors*, Georgia Tech University, Georgia Tech Hotel & Convention Center, Atlanta, Georgia, November 2, 2016.
- “Invest With The Fed,” *Investment Revolution: The Future of Investing & Risk Management – A Cantor Fitzgerald ETF & Portfolio Trading Group Workshop for Institutional Investors*, Loyola University, Corboy Law Center, Chicago, Illinois, October 5, 2016.
- “Professionalism and Purpose,” *NAIFA Pennsylvania’s Eastern Regional Sales Symposium*, Philadelphia, PA, September 29, 2016.
- “Professionalism and Purpose,” *Navigating the New World of Financial Services*, *The American College*, Atlanta, GA, August 23, 2016.
- “Professionalism and Purpose,” *Bankers Life Financial Advisor University*, Chicago, IL, July 28, 2016.
- “Continued Education,” *Ohio National Convention*, Broadmoor, Colorado Springs, Co. July 21, 2016.
- “The Association between Federal Reserve Policy and Sector Returns,” *The Society of Financial Services Professionals*, Teleconference, July 13, 2016.
http://www.financialpro.org/members/media/lbc_071316.mp3
- “Invest With The Fed,” *CFA Society of Indianapolis*, Indianapolis, IN, April 21, 2016.
- “Invest With The Fed,” *John Hancock Lunch and Learn*, Cherry Hill, NJ, March 17, 2016.
- “Invest With The Fed,” *CFA Society of Iowa*, Des Moines, IA, March 9, 2016.

“Invest With The Fed,” *CFA Society of Nebraska*, Omaha, NE, February 10, 2016.

“Invest With The Fed,” *West Coast Retirees Lunch*, Naples, FL, January 21, 2016.

“Invest With The Fed,” *CFA Society of Philadelphia*, Philadelphia, PA, December 16, 2015.

“Invest With The Fed,” *ETF & Indexing Forum*, hosted by Cantor Fitzgerald and the CFA Society of Jacksonville, Tallahassee, FL, November 13, 2015.

“Invest With The Fed,” *Omaha-Lincoln Society of Financial Services Professionals*, Ashland, Nebraska, November 6, 2015.

“Invest With The Fed,” *CFA Society of Cincinnati*, Cincinnati, Ohio, October 8, 2015.

“Invest With The Fed,” *Inaugural ETF & Indexing Forum*, hosted by Cantor Fitzgerald and the Center for Institutional Investment Management, The University at Albany, Albany, New York, April 17, 2015.

“Invest With The Fed,” *Atlanta Chapter of the Society for Financial Services Professionals*, Atlanta, Georgia, April 16, 2015.

“Investment Essentials for Clients Nearing Retirement,” *Advisys Webinar*, May 28, 2014. (with Tom Robinson).

“Ethics Training,” *CFA Society of Nebraska*, Omaha, NE, March 25, 2014.

“What to Expect When You’re Electing,” *Southern Finance Association Annual Meeting*, Farjardo, Puerto Rico, November 23, 2013. (with Scott Beyer, Luis Garcia-Feijoo, and Gerald R. Jensen).

“The Crisis of Confidence and Restoring Trust in the Capital and Political Markets,” *several university presentations and a CFA Ukraine presentation*, Kiev, Ukraine, March 4-8, 2013.

“Financial Ethics Workshop,” *CFA Ukraine*, Kiev, Ukraine, March 7, 2013.

“The Crisis of Confidence and Restoring Trust in the Capital and Political Markets,” *El Salvador CFA Conference*, San Salvador, August 30, 2011.

“The Crisis of Confidence and Restoring Trust in the Capital Markets,” *Peru Capital Markets Day*, Lima, July 11, 2011.

“The Financial Crisis,” *Financial Analysis and Policy Conference*, *University of Nebraska-Lincoln*, November 6, 2009.

- “Can Precious Metals Make Your Portfolio Shine?” *Financial Management Association Annual Meeting*, October 2008. (with C. Mitchell Conover, Gerald R. Jensen and Jeffrey M. Mercer).
- “Elections and Capital Market Returns, *CFA Society of Nashville*; and *CFA Society of Detroit*, April 2008.
- “Politics and Capital Market Returns,” *CFA Society of Seattle*; and *CFA Society of Spokane*, June 2007.
- “Politics and Capital Market Returns,” *CFA Iowa*, April 2007.
- “Time-varying Risk and Return Characteristics of U.S. and European Bond Markets: Implications for Efficient Portfolio Allocation,” *Southwestern Finance Association Annual Meeting* (with Philip J. Young and Thomas H. Payne).
- “Risk Shifting Around Calls of Convertible Debt.” *Financial Management Association Annual Meeting*, October 2006. (with Scott B. Beyer and Luis Garcia Feijóo).
- “An Examination of Relative Volatility in the German Debt and Equity Markets” *European Financial Management Association Annual Meeting*, June 2006. (with Philip J. Young).
- “Bond Market Volatility & Stock Market Volatility: Evidence from Germany.” *Southwestern Finance Association Annual Meeting*, March 2, 2006. (with Philip J. Young)
- “Risk Changes Around Calls of Convertible Debt.” *Southern Finance Association Annual Meeting*, November 18, 2005. (with Scott B. Beyer and Luis Garcia-Feijoo).
- “Political Party Affiliation and Capital Market Returns.” *The Omaha-Lincoln Society of Financial Analysts*, Omaha, Nebraska, September 15, 2006.
- “Political Party Affiliation and Capital Market Returns.” *CFA Society of Rochester*, June 15, 2005.
- “An Analysis of the Interest Rate Sensitivity of Common Stocks Using Empirical Duration.” *European Financial Management Association International Annual Conference*, Sienna, Italy, June 9, 2005. (with Frank K. Reilly and David Wright).
- “An Analysis of the Interest Rate Sensitivity of Common Stocks Using Empirical Duration.” *Midwest Finance Association Annual Conference*, March 2005, Milwaukee, WI. Paper received the award as the Outstanding Paper in Investments. (with Frank K. Reilly and David Wright).

- “Political Party Affiliation and Stock Market Returns.” *Jacksonville Society of Financial Analysts*, March 9, 2005.
- “Is Fed Policy Still Relevant for Investors.” *Southern Finance Association Annual Meeting*, November 19, 2004. (with C. Mitchell Conover, Gerald R. Jensen and Jeffrey M. Mercer).
- “Don’t Worry About the Election – Just Watch the Fed.” *Edmonton Society of Investment Professionals*, October 28, 2004.
- “Don’t Worry About the Election – Just Watch the Fed.” *Calgary Society of Investment Professionals*, October 27, 2004.
- “Bond Market Volatility vs. Stock Market Volatility: Evidence from Switzerland.” *European Financial Management Association International Annual Conference*, Zurich, Switzerland, June 3, 2004. (with Philip J. Young).
- “Monetary Policy and Capital Market Returns.” *Richmond Society of Financial Analysts*, April 22, 2004.
- “Monetary Policy and Capital Market Returns.” *Melbourne Society of Financial Analysts*, February 2, 2004.
- “Monetary Policy and Capital Market Returns.” *Calgary Society of Financial Analysts*, October 28, 2003.
- “Monetary Policy and the Coskewness in Stock Market Returns.” *Financial Management Association International*, Denver, October 2003. (with Richard DeFusco and Gerald R. Jensen).
- “Bond Market Volatility vs. Stock Market Volatility: Swiss Evidence.” *Southwestern Finance Association*, San Antonio, March 4-8, 2003. (with Philip J. Young).
- “Time Variation in the Benefit of Managed Futures.” *Southern Finance Association*, Key West, Florida, November 21, 2002. (with Gerald R. Jensen and Jeffrey M. Mercer).
- “Bond Market Volatility Compared to Stock Market Volatility: Evidence from the UK.” *Southern Finance Association*, Key West, Florida, November 22, 2002. (with Philip J. Young).
- “Monetary Policy and Capital Market Returns.” *Tampa Society of Financial Analysts*, November 12, 2002. (with Gerald R. Jensen and Jeffrey M. Mercer).

- “An Analysis of Total Interest Rate Exposure for High Yield Bonds.” *Financial Management Association International*, Orlando, FL, October 19, 2002. (with Frank K. Reilly and David Wright).
- “Monetary Policy and Capital Market Returns.” *The Sydney Society of Financial Analysts*, September 11, 2002. (with Gerald R. Jensen and Jeffrey M. Mercer).
- “Monetary Policy and Capital Market Returns.” Research for the Practitioner: The Research Foundation Pre-conference Workshop, *AIMR Annual Conference*, Toronto, May 12, 2002. (with Gerald R. Jensen and Jeffrey M. Mercer).
- “Bond Market Volatility vs. Stock Market Volatility: Evidence from the UK.” *Southwestern Finance Association*, St. Louis, Missouri, March 8, 2002. (with Philip J. Young).
- “An Analysis of the Empirical Duration for High-Yield Bonds.” *Midwest Finance Association*, Chicago, Illinois, March 15, 2002. (with Frank K. Reilly and David Wright).
- “Tactical Asset Allocation and Commodity Futures.” *Southern Finance Association Meeting*, Destin, Florida, November 30, 2001. (with Gerald R. Jensen and Jeffrey M. Mercer).
- “Tactical Asset Allocation and Commodity Futures.” University of Missouri-Columbia, September 28, 2001. (with Gerald R. Jensen and Jeffrey M. Mercer).
- “An Analysis of the Interest Rate Sensitivity of Common Stocks Using Empirical Duration.” University of Nebraska-Lincoln, September 8, 2001. (with Frank K. Reilly and David Wright).
- “An Analysis of the Interest Rate Sensitivity of Common Stocks Using Empirical Duration.” *The Orlando Society of Financial Analysts*, April 18, 2001. (with Frank K. Reilly and David Wright).
- “An Analysis of the Interest Rate Sensitivity of Common Stocks Using Empirical Duration.” *Financial Management Association Annual Meeting*, Seattle, Washington, October 2000. (with Frank K. Reilly and David Wright).
- “The Role Of Monetary Policy in Investment Management.” *Atlanta Society of Financial Analysts*, September 2000. (with Gerald R. Jensen and Jeffrey M. Mercer).
- “Monetary Policy and Fixed Income Returns.” *Financial Management Association International Annual Meeting*, Edinburgh, Scotland, May 2000. (with Gerald W. Buetow, Gerald R. Jensen and Frank K. Reilly).

“Federal Reserve Monetary Policy and Real Estate Returns.” *Eastern Finance Association Annual Meeting*, Williamsburg, Virginia, (with Gerald R. Jensen).

“Business Conditions, Monetary Policy and Expected Security Returns.” *Financial Management Association Annual Meeting*, St. Louis, Missouri, October 1994. (with Gerald R. Jensen and Jeffrey M. Mercer).

“The Effect of U.S. Discount Rate Change Announcements on Canadian Stock Prices.” *Southwestern Finance Association Annual Meeting*, New Orleans, Louisiana, March 1993. (with Gerald R. Jensen).

“Federal Reserve Discount Rate Changes and Stock Returns from Different Industries.” *Midwest Finance Association Annual Meeting*, Chicago, Illinois, March 1992. (with Gerald R. Jensen and W. Scott Bauman).

“Discount Rate Changes and Postannouncement Stock Returns.” *Southern Finance Association Annual Meeting*, Key West, Florida, November 1991. (with Gerald R. Jensen).

“The Reaction of Foreign Stock Markets to U.S. Discount Rate Changes.” *Midwest Finance Association Annual Meeting*, St. Louis, Missouri, April 1991. (with Gerald R. Jensen).

“A Cross Sectional Study of the Reaction of Stock Prices to Discount Rate Changes.” *Midwest Finance Association Annual Meeting*, Chicago, Illinois, April 1990. (with Gerald R. Jensen).

“Executive Stock Options: Effects on Risk-Taking, Investment, and Capital Structure.” *Financial Management Association Annual Meeting*, Boston, Massachusetts, October 1989. (with Richard DeFusco and Thomas S. Zorn).

“Wealth Redistributions and Variance Changes: The Case of Executive Stock Option Plans.” *Financial Management Association Annual Meeting*, New Orleans, Louisiana, October 1988. (with Richard DeFusco and Thomas S. Zorn).

“The Effect of Insider Ownership on a Firm’s Financial Decisions.” *Midwest Finance Association Annual Meeting*, Chicago, Illinois, April 1988. (with Gerald R. Jensen).

“The Information Content of a Stock’s Price History: An Empirical Analysis.” *Midwest Finance Association Annual Meeting*, St. Louis, Missouri, March 1987. (with Gerald R. Jensen).

“A Goal Programming Model for Allocating Wealth.” *TIMS/ORSA Joint Annual Meeting*, New Orleans, Louisiana, May 1987. (with Thomas S. Zorn and Marc Schneiderjans).

Appendix B: Radio and TV Appearances

Appeared on

Nasdaq.com – [An Index That Seeks to Use Federal Reserve Policy Signals](#), July 27, 2022.

Financial Recon – [Wrapping Up the 2021 Berkshire Hathaway Annual Meeting w/Bob Johnson](#), Season 1, Episode 9, May 17, 2021.

NTDNews – [Market Sell-Off as Treasury Yields Rise; JP Morgan; EV Bubble will Deflate](#), February 25, 2021.

TheStreet.com – [What to Expect in the Economy Post Election](#), December 8, 2020.

KIOS 91.5 FM (Omaha) – Elections and the Stock Market, November 10, 2020.

KETV (Omaha) – ['Everybody's circumstances are a little different': Finance professor urges caution while spending stimulus payments](#), April 17, 2020.

Yahoo!Finance – [Berkshire Hathaway Annual Meeting Livestream](#), May 4, 2019.
(Segment starts at 3:13 mark)

Talk Media News – [American College of Financial Services CEO Bob Johnson Talks Tax Reform](#), August 15, 2017.

Investment News – [American College's Robert Johnson: What makes next-gen advisers different?](#) May 15, 2017.

Boom and Bust (RT TV) – [Interview with Lindsay France. Retirement Income Crisis](#), January 21, 2017.

Jason Hartman Podcast – [Interview with Jason Hartman. Invest with the Fed, Maximizing Portfolio Performance by Following Federal Reserve Policy & What to Expect When You're Electing](#), December 2016.

The Street – [Interview with Gregg Greenberg. Bondholders Beware as Fed Starts Hiking Rates](#), December 6, 2016.

The Street – [Interview with Gregg Greenberg. Take Profits in Small Caps As Fed Gears Up To Hike Rates](#), December 6, 2016.

Reuters – [TV Interview with Bobbi Rebell. Markets' Fed obsession has reached absurd level](#), September 12, 2016.

ShiftShapers Podcast – [Is Pracademics the Key to a Successful Retirement Income Planning Practice? Interview with David Saltzman](#), August 8, 2016.

BNN (Canada) – [TV Interview. Why Wall Street Wants Hillary Clinton](#). July, 18, 2016.

Bloomberg Radio – [Interview with Tom Keene. Upcoming Fed meeting](#), May 31, 2016.

BNN (Canada) – [TV Interview. Why a Democratic President Can be Sometimes Better for the Stock Market](#). May 11, 2016.

Bloomberg Radio – [Interview with Barry Ritholtz on Masters in Business podcast series](#), April 18, 2016.

Bloomberg Radio – [Interview with Tom Keene, Bloomberg Surveillance, DOL, Retirement Crisis, Fed](#), March 29, 2016.

BNN (Canada) – [Interview on TV. Fed Will Raise Rates Twice in 2016](#), March 11, 2016.

WNZF AM, WNZF FM, WNDB AM, WNDB FM – [Real Money with David Holland, Invest With the Fed](#), January 5, 2016.

NBC10 Philadelphia – Interview on Evening News, Comment on Recent Fed Rate Increase, December 16, 2015.

NBC10 Philadelphia – [Interview on Noon News with Vai Sikahema, Pending Fed Rate Increase](#), December 16, 2015.

Bloomberg Radio – Interview with Tom Keene, Bloomberg Surveillance, Pending Fed Rate Increase, December 14, 2015.

Knowledge@Wharton Business Radio – [Interview with Dan Loney, SiriusXM Business Radio](#), October 19, 2015.

Dr. Carlos Show – [Investing According to Federal Rates](#), Radio Show, October 12, 2015.

KPFT 90.1 Radio – Interview with Christopher Hensley, Money Matters Radio Show, October 9, 2015.

Bloomberg Radio – Interview with Tom Keene, Bloomberg Surveillance, Invest With the Fed, October 9, 2015.

Reuters – [Interview with Fred Katayana, How to play the Fed Meeting next Tuesday](#), September 9, 2015.

The Street – [Interview with Gregg Greenberg, Surprise! REITs, Emerging Markets Do Well When Fed Rates Rise](#), September 9, 2015. also on <http://realestate.aol.com/blog/videos/real-estate/519067236/>

Aol.OnNetwork – [U.S. Stocks Tumble](#), September 9, 2015.

Wall Street Unfiltered – [Interview with Mark Melvin](#), published on June 17, 2015.

Financial Sense Network – [Interview with Cris Sheridan, Financial Sense Newshour](#) – published on June 8, 2015. Also on <https://www.youtube.com/watch?v=gAnXioqA6H0&feature=youtu.be&a>

AM580 – Money Matters with Brian Kurtz – Invest With The Fed, taped on May 21, 2015. Aired on May 23, 2015.

The Street – [Interview with Gregg Greenberg – Invest With The Fed](#), taped on April 1, 2015. Aired on April 3, 2015.

MoneyLife Radio – [Interview with Chuck Jaffee – Invest With The Fed](#), taped on March 25, 2015. Aired on March 27, 2015.

Wealth DNA Radio – [Interview with Ron Narwocki – Invest With The Fed](#), March 23, 2015.

Executive Leaders Radio – [Interviewed](#), March 6, 2015.

WEI Radio(Florida) – Scotty Z's Sports Locker – Super Bowl Stock Market Indicator, January 20, 2014.

Health, Wealth & Wisdom Radio (Tampa, FL) – Debt Ceiling and Government Shutdown, November 4, 2013.

Dubai Eye Business Radio (Dubai UAE) – Dodd-Frank, January 4, 2011.

Bloomberg Radio – (live) Taking Stock with Pimm Fox, November 1, 2010.

VoiceAmerica Radio – (live) Insightful Investor, Elections, Politics and Markets. November 1, 2010.

Bloomberg Radio – (live) Bloomberg Surveillance, CFA's Johnson provides update on CFA Program, September 7, 2010.

BNN (Canada, Live), Squeeze Play, Is Now the Time to Add Commodities to Your Portfolio? April 7, 2010.

KABC-790AM (Los Angeles) -- "Market Wrap With Moe Ansari. Discussed commodities study, April 7, 2010.

Bloomberg TV – (live) CFA’s Johnson discusses Level I pass rate decline, February 1, 2010.

Dubai Eye Business Radio (Dubai UAE) – CFA Program Growth, January 25, 2010.

CBS Radio News – Next hot jobs, December 11, 2009.

Class CNBC (Milano, Italy) – The Financial Crisis, taped May 28th 2009.

SCMP.Com (Hong Kong) – CFA’s Head Pushes for Charter’s Rise Globally, May 24, 2009.

Channel News Asia TV (Singapore) – Asia Business Tonight (taped) Financial Crisis, taped March 6, 2009 and aired March 9, 2009.

Channel News Asia TV (Singapore) – Money Mind (taped) Financial Crisis, taped and aired March 6, 2009.

Fox Business News TV (NYC) – Happy Hour (live), CFA Institute, February 3, 2009.

Intereconomia TV (Madrid) – Capital (live), Socially Responsible Investing and ESG Investing, November 19, 2008.

WBIX AM-1060 (Boston), CFA Program enrollments, August 21, 2008.

WBIX AM-1060 (Boston), Fed actions and sector rotation, January 25, 2008.

Bloomberg TV (Europe – Live), Fed actions and sector rotation, December 6, 2007.

BNN (Canada), Fed discount rate and fed funds rate cut, September 18, 2007.

WBIX AM-1060 (Boston), Fed actions and Sector Rotation, September 14, 2007.

CNBC – Squawk Box (live), Fed actions and Sector Rotation, September 6, 2007.

BNN (Canada) – Squeeze Play, Third Year Effect, July 6, 2007.

ABC World News Now, Third Year Effect, May 17, 2007 (taped on May 15, 2007).
Interviewer was Ryan Owens.

CNBC – Morning Call (live), interviewer was Mark Haynes, November 7, 2006.

Bloomberg TV (live), Money and Politics, October 24, 2006.

CNBC Europe (Italy), May 2006.

Bloomberg Radio – (interviewer was Samantha Zee) San Francisco, CFA Program enrollments (tape), April 4, 2006.

Summit TV – Johannesburg, CFA Program (tape), December 1, 2005.

Radio 2000 – Johannesburg (Radio), Moneyweb Power Hour, CFA Examination (live), December 2, 2005.

China Business News – Shanghai (TV), CFA Program, September 26, 2005 and October 11, 2005.

ABC News Radio (live), Investor Friendly Companies, July 15, 2005.

WINA Radio – Charlottesville (live), CFA Program Grading, June 28, 2005.

Greenberg News WNJC Radio, New Jersey (live) – Twelve Common Investing Mistakes, May 5, 2005.

TV8 (Stockholm, Sweden) – Corporate Governance and Ethics, February 24, 2005.

ABC World News This Morning (live) – Corporate Earnings Reports, February 16, 2005.

SET (Stock Exchange of Thailand) in the City (Bangkok) – Federal Reserve policy, February 1, 2005.

ABC World News This Morning (live) – Industry Returns and the interest rate environment, December 22, 2004.

TVNZ (New Zealand) – CFA Program and CFA Centre for Financial Market Integrity (live) on *ASB Business*, December 1, 2004.

KCSN Radio (California) – Fed Policy and Industry Returns (tape), November 19, 2004.

Report on Business (ROB)-TV – Canada (live), US Elections and the Market on *The Business News*, November 2, 2004.

WBNW Radio – Boston (live), US Elections on *Money Matters*, November 2, 2004.

CNBC Europe TV – London (live), US Election on *Today's Business*, November 1, 2004.

WINA Radio – Charlottesville (live), Twelve Common Investing Mistakes, September 15, 2004.

WBIX Radio – Boston (tape), Twelve Common Investing Mistakes, August 4, 2004.

KFNN Radio – Phoenix (live), Twelve Common Investing Mistakes, July 30, 2004.

Bloomberg TV – (tape), Stock Market and the Election, July 29, 2004.

CNNfn – The Flipside (live), Stock Market and the Election, July 29, 2004.

Dow Jones Radio/DJ Money Report, Stock Market and the Election, July 29, 2004.

WREC Radio – Memphis (tape), Twelve Common Investing Mistakes, July 29, 2004.

KSRC Radio – Kansas City (tape), Twelve Common Investing Mistakes, July 28, 2004.

WVOI Radio – Ft. Myers/Naples (live), Twelve Common Investing Mistakes, July 28, 2004.

WCLT Radio – Columbus, Ohio (tape), Twelve Common Investing Mistakes, July 28, 2004.

WLIE Radio – Long Island (live), Twelve Common Investing Mistakes, July 28, 2004.

KPRI Radio – San Diego (tape), Twelve Common Investing Mistakes, July 28, 2004.

WJSS Radio – Baltimore (live), Twelve Common Investing Mistakes, July 28, 2004.

WVNU Radio – Cincinnati (live), Twelve Common Investing Mistakes, July 28, 2004.

WLIE Radio – Long Island (live), Twelve Common Investing Mistakes, July 28, 2004.

Bloomberg Radio (live), Twelve Common Investing Mistakes, July 27, 2004.

WBNW Radio – Boston (live), Twelve Common Investing Mistakes, July 27, 2004.

ABC World This Morning (live), Stock Market and the Election, July 23, 2004.

ABC World News News This Morning (live), “Investing/Risk,” April 29, 2004.”

APPENDIX C: MEDIA QUOTES

- [“It's Been a Wild Ride for the Stock Market. What's Next?”](#) by Rebecca Safier, *CNET.com*, October 30, 2022.
- [“Housing market predictions for 2023,”](#) by Erik J. Martin, *Bankrate.com*, [MSN.com](#), and [LancasterOnline.com](#), October 24, 2022.
- [“Stimulus Payments 2022: How Americans Say They Would Spend an Additional Check,”](#) by Gabrielle Olya, *GoBankingRates.com*, [Nasdaq.com](#) and [Yahoo!Finance.com](#), October 24, 2022.
- [“Why Stocks Rallied At the End Of The Week,”](#) by Panos Mourdoukoutas, *InternationalBusinessTimes.com*, October 23, 2022.
- [“Why Gen Z is Saving More for Retirement,”](#) by Rachel Hartman, *USNews.com* and [MSN.com](#), October 19, 2022.
- [“Further Declines' or 'Reasonable Returns?' Stock Market Predictions for the Next Year,”](#) by Rebecca Safier, *CNET.com*, October 19, 2022.
- [“What are dividends? How they work and key terms you need to know before investing,”](#) by Ivana Pino, *Fortune.com* and [Yahoo!Finance.com](#), October 18, 2022.
- [“What are bonds? How they work—and how to invest in one of 2023’s most promising markets,”](#) by Ivana Pino, *Fortune.com*, October 17, 2022.
- [“The Stock Market Is a Hot Mess. 5 Experts Predict What's Next,”](#) by Rebecca Safier, *CNET.com*, October 16, 2022.
- [“What state is the metaverse in today after the NFT boom?”](#) *NewsItaly24.press*, October 15, 2022.
- [“Decentraland: In Che Stato È Oggi Il Metaverso Dopo Il Boom Degli NFT?”](#), by Francesco Santin, *Everyeye.it*, October 15, 2022.
- [“As inflation rages, government counters with 8.7% Social Security increase for 2023,”](#) by Doug Bailey, *InsuranceNewsNet.com*, October 13, 2022.
- [“Inflation sees slight improvement in September but still near record-high level,”](#) by Nora Colomer, *FoxBusiness.com*, October 13, 2022.
- [“5 Easy Financial Habits That Experts Swear By,”](#) by Heather Taylor, *GoBankingRates.com* and [Nasdaq.com](#), October 12, 2022.

- [“Why Do 6-Figure Wage Earning Americans Live Paycheck To Paycheck?”](#) by Panos Mourdoukoutas, *InternationalBusinessTimes.com*, October 3, 2022.
- [“Is Microeconomics a Part of Economics?”](#) by Amit Jagga, *ReflectionBusiness.com*, October 3, 2022.
- [“FinancialCentre Broker Reveals 3 Safe Picks for Stable, Steady Gains in 2023,”](#) *Marketwatch.com*, September 30, 2022.
- [“S&P 500 Could Rise More Than 25% Over The Next 12 Months: Industry Analysts,”](#) by Panos Mourdoukoutas, *InternationalBusinessTimes*, September 29, 2022.
- [“How to Save Money: 10 Expert-Backed Ways,”](#) by Geoff Williams, *USNews.com*, September 26, 2022.
- [“What The End Of Free Money Means For Investing In Financial Assets,”](#) by Panos Mourdoukoutas, *InternationalBusinessTimes.com*, September 24, 2022.
- [“Fed Boosts Rates Again: Here’s How to Cope With Higher Interest Rates,”](#) by Andrew Moran, *TheEpochTimes.com*, September 21, 2022.
- [“DFW Has The Fifth Fastest Rising Inflation Rate, Study Found,”](#) by Virginia Mingorance, *LocalProfile.com*, September 21, 2022.
- [“6 reasons to rethink early retirement,”](#) by Jennifer Nelson, *TheOaklandPress.com* and *FlatlandKC.org*, September 18, 2022.
- [“6 Purchases Retirees Almost Never Regret,”](#) by Gabrielle Olya, *GoBankingRates.com*, *AOL.com* and *Nasdaq.com*, September 15, 2022.
- [“Minneapolis-St Paul-Bloomington metropolitan area has ninth highest inflation rate,”](#) *TheCenterSquare.com*, September 14, 2022.
- [“What Is An IPO?”](#) by Kate Ashford and John Schmidt, *Forbes.com (India)*, September 14, 2022.
- [“10 Best Energy Stocks to Buy in 2022,”](#) by Matt Whittaker, *USNews.com*, September 13, 2022.
- [“Cities Where Inflation is Rising the Most,”](#) by Adam McCann, *Wallethub.com* and *TimesofSanDiego.com*, September 13, 2022.
- [“7 Best Oil and Gas Stocks to Buy Now,”](#) by Matt Whittaker, *USNews.com*, September 8, 2022.

[“Heider College of Business professor partners with Nasdaq in new business venture,”](#) by Molly Garriott, *Creighton.edu*, September 7, 2022.

[“How long will crypto winter last and what does it mean for payments?”](#) by Pauline L., *FinExtra.com*, September 6, 2022.

[“Crypto Winter Is Coming: What You Need To Know,”](#) by Farran Powell and Benjamin Curry, *Forbes.com*, September 5, 2022.

[“What Is a Meme Stock?”](#) by Devon Delfino, *SoundDollar.com*, September 1, 2022.

[“Ranking Your 401\(k\) Account Against Your Peers,”](#) by Brian O’Connell, *TheStreet.com*, September 1, 2022.

[“The 6 Keys to Successful Retirement Planning for Millennials,”](#) by Casey Bond, *GoBankingRates.com* and [Yahoo!Finance.com](#), August 29, 2022.

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