CURRICULUM VITAE

CAGLA YILDIRIM

Education

Ph.D.	Personal Financial Planning, Texas Tech University	**2017-Exp**
M.S.	Personal Financial Planning, Texas Tech University	**2014**
B.S.	Personal Financial Planning, William Paterson University	**2011**
A.S.	Business Administration, County College of Morris	**2009**

Areas of Interest

Research: Retirement Planning, Investment Choices, and Behavioral Finance
Teaching: Wealth Management, Household Economics and Applied Family Financial Planning

Administration Experience – Texas A&M University

Resident in Financial Planning **Present**

Experience in how a program is formed, funded, and maintained. Projects include: How courses are proposed at the College and University Level, New course development, Fund raising for growing program and integration with a University Foundation, Leading students to competitions and conferences.

Teaching Experience – Texas Tech University

Instructor- Fundamentals of Asset Management **Summer 2016- Summer2017**

Investment management concepts in a personal financial planning context; client goals, expectations, and risk tolerance; capital markets; investment alternatives; security valuation; risk assessment; and portfolio management concepts. Graduate and undergraduate level.

Instructor- Introduction to Applied Personal Finance **Summer 2016**

Survey course in personal financial planning for any students wanting to use this information in their personal and professional lives. Graduate level.

Teaching Assistant for Harold Evensky- Wealth Management **Spring 2013- Spring 2016**

Theory and practice of wealth management to include concepts of modern portfolio design and implementation, tax management, behavioral finance, product evaluation and selection and regulatory issues. Graduate level.

Teaching Assistant for John Salter -Retirement Planning **Fall 2013- Fall 2014**

Advanced studies in retirement planning covering retirement plans in the corporate setting, personal retirement planning, and retirement income strategies. Graduate and undergraduate levels.

Instructor- Money Management Basics **Summer 2013**

Introduces basic financial decision-making regarding spending plans and use of consumer credit. Distance course.

Teaching Assistant for Deena Katz- Business Practices & Entrepreneurship **Fall 2012**

Introduces basic business skills, marketing and management skills to learn how to start, manage and maintain a personal financial planning practice.

Presentations at Professional Meetings and Conferences

"Is Increase in Medical Expenses Offset by Reduction in other expenditures?"
-Academic Research Colloquium for Financial Planning and Related Disciplines, February 2017
(Poster Session with Muna Alabed)

"Determinants of Financial Well Being Among Women: Does annuitized income affect women's financial satisfaction?"
-Academy of Financial Services, October 2016
(General Session)

Field Experience

Financial Asset Management, Assistant Financial Planner, New York, NY **2011-2012**
Supervisor: Viktoria Kamin
(Full Time)

Macro Consulting Group Internship, Parsippany, NJ **Jan/2011-Apr/2011**
Supervisor: Heidi Heath
(Part time)

Merrill Lynch Internship, Wayne, NJ **Sept/2010-Jan/2011**
Supervisor: Topinka Group
(Part time)

Service

Red to Black®, Peer Financial Coach, TTU **2012-2016**
Provided individual coaching sessions and group presentations on topics such as creating spending plans, the importance of starting to save early and use of credit.

Graduate Advisory Council, Chief of Staff, TTU **2014-2015**
Supported commission chairs in developing leadership skills necessary to lead commissions.

University Discipline Committee, TTU **Fall 2015**

Served as the college representative.

Student Managed Portfolio, Chairperson, WPU **2009-2011**

Managed real money and developed expertise in making investment decisions.

Awards – Honors

AT&T Chancellor's Scholarship, Texas Tech University	**2014**
Excellence in Leadership Award, Texas Tech University	**2013**
Cotsakos College of Business Award Excellence in Financial Planning	**2011**
Member of the 1st Place team at FPA National Challenge	**2010**
Received New Jersey Joint Legislative Resolution	**2010**
Inducted to Beta Gamma International Business Honor Society	**2009**
Chosen among top 14 students to participate in Job Shadowing Program	**2009**

Skills

Computer: STATA, R, Morningstar, Bloomberg
Language: Native speaker of Turkish, Conversational Syrian & Beginner German

Professional Associations

Member, Financial Planning Association
Member, Academy of Financial Services